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FINANCIAL TIMES

Monday July 14 1975

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NEWS SUMMARY

GENERAL

Jet raid as Rabin speaks of peace

As Israeli jets attacked a Palestinian refugee camp near the border in southern Lebanon yesterday, Mr. Yitzhak Rabin said in Tel Aviv that he was "more optimistic" about the chances of reaching a second interim Middle East agreement with Egypt.

However, Mr. Rabin, who was speaking on his return from weekend talks at Bonn with Dr. Henry Kissinger, U.S. Secretary of State, warned that such agreement might take weeks or even months.

In Israel, yesterday's air raid was seen as fulfilment of Mr. Rabin's pledge to talk to Palestinian organisations only with the sword.

Palestinian guerrilla sources claimed that two people died and 22 were wounded in the attack. The Israelis, they said, lost two aircraft, although a Lebanese military spokesman would confirm only one. Back and Page 6

150 arrested in Spanish Sahara

Police and troops arrested more than 150 people at El Aaiun, capital of the disputed Spanish Sahara, following a weekend of nationalist bombings in which four people died. Three policemen were killed as they tried to dispose of a parcel bomb.

IRA jailbreaker reported held

Liverpool police would neither confirm nor deny a report that IRA jailbreaker Sean Ninnes was among four Irishmen helping inquiries in connection with a shooting in which two Liverpool policemen were wounded. In Belfast, Mr. Ernest Baird, deputy leader of the Vanguard Party, forecast the failure of the Ulster Convention. Page 4

Callaghan visits Poland

Mr. James Callaghan, Foreign Secretary, who arrived in Poland for a three-day official visit to discuss political and economic problems, said that Britain was "keenly interested in the development of trade with East bloc countries."

The minutiae of detente

Official Soviet time has been advanced by one thousandth of a second to synchronise with U.S. time so that the two countries are co-ordinated during this week's Soyuz and Apollo programme. An Invercargill, New Zealand, astronomer claimed to have discovered an apparent collision between a meteorite and an artificial satellite, causing it to break up.

£25-a-week plea by school leavers

The National Union of School Students at its annual conference in London demanded a better deal for the out-of-work school leaver, including a minimum dole of £25 a week.

Watson's Open

Tom Watson of the U.S. beat Jack Newton of Australia by one stroke—71-72—in yesterday's 18-hole Carnoustie Open at the 104th Open Championship. Page 2

Briefly...

Snowy owls, Britain's rarest regular breeding birds, have hatched four chicks at their protected Feltar nest site in the Shetlands.

President Ford made it known that he would welcome Mr. Alexander Solzhenitsyn, the Nobel prize-winning dissident Soviet author, at the White House.

Mr. Edward Heath, former Tory leader, has recorded a programme with jazz pianist Oscar Peterson for showing next year on BBC television.

High prices were paid at a week-end £300,000 sale of 28 tons of ivory in Mombassa.

BUSINESS

Industry sceptical on pay policy

LATEST FT monthly survey of business opinion shows industry inclined to be sceptical about chances of the Government's new pay policy working effectively, before the appearance of Friday's White Paper. Most companies saw the Government's firmness in seeing policy through.

Few thought the going rate wage settlements would be reduced as far as 10 per cent. It would be some time before a trend of output prices followed suit. Most companies saw reason to alter their views of the business and economic situation—now very pessimistic. Back Page

WESTERN economies must severely cut money supply growth rate if they are eventually to avoid a 1930s-style depression, economist Prof. Hayek says. Page 4

AUSTRALIAN Government may renew its efforts to raise international loans to finance resources development and "buy-back" from foreign countries. Prime Minister Gough Whitlam indicated. Page 6

CHEQUES passed through the Bankers' Clearing House in June were at £149,718m, 14 per cent. higher than a year previous, showing faster growth rate over the 1974 figure than was forecast. Page 4

TRAVEL Industry's concern over "discount" airline tickets is likely to be deepened by a report showing differences between mileage rates on various airlines, and big gaps between high and low, official and unofficial fares on the same routes. Page 4

TUC warned on wage-ceiling

TUC has been warned by some of its more affluent member-unions that its call for a high pay ceiling is contrary to Britain's economic interests. Page 7

NATIONAL GRAPHICAL Association will withdraw its application for readmission with the TUC, first lodged 14 months ago, unless it receives a definite answer within the next four weeks. Page 7

DALGETY GROUP four-man team from the £200 National Management Plan Competition for teams knocked out in the first round of the U.K. management championship, organised annually by the FT, ICL and the Institute of Chartered Accountants in England and Wales. Page 4

BRITISH GAS is to spend a further £100m. on its natural gas pipeline system. A 200-mile extension is planned for its southern feeder network. Page 4

Fears for steel companies

SOME private-sector steel companies may "go to the wall" in the present economic situation, Mr. Peter Edwards, Dunford Hadfields chairman and managing director, warned. Page 4

BRITISH LEYLAND is challenging claims, being investigated by the U.S. Treasury, that European manufacturers have dumped some of their cars on the American market. Back Page

ANOTHER turbulent British Leyland meeting is likely at the Europa Hotel in London, today, when shareholders meet to vote on whether to accept the Scheme of Arrangement designed to transfer ownership of the company to the Government. Back Page

REED PAPER, Reed Int'l's principal Canadian operating company, plans to raise some Can. \$46m. (£20m.) by way of a rights issue. Page 22 and Lex

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TUC plans major campaign to sell £6-a-week policy

BY JOHN ELLIOTT, Labour Editor

TUC leaders will this week start planning a major campaign to sell the new £6-a-week pay policy contained in last Friday's White Paper, against a backdrop of considerable opposition to the policy from some public sector and white collar unions.

His opposition built up over the week-end when the National Union of Public Employees decided to oppose the policy, the Local Government Association tabled a list of reservations and the Association of Scientific, Technical and Salaried Staffs condemned aspects of the policy.

At the National Union of Teachers decided to back the policy by a narrow margin after a long debate. These decisions came from unions' national executives while the opposition of the TUC plus the reservations of the TUC reflect a considerable of opinion within the public sector. It does not necessarily indicate that the £6 wage will likely be challenged negotiations.

JPE will be in the forefront of negotiations in the public sector when pay talks start in autumn for 1.25m. local council and hospital manual workers and seems quite likely to be the first to break out of the £6 providing it is offered. A similar attitude would be shared by the other unions involved in these negotiations. Transport and General Workers and the only major workers' union to be likely to break out of the £6 limit is the local council workers, who are hard-pressed for finance, and to try to secure a deal of the £6 level.

But the opposition of NUPE and the other unions is important for the general presentation of the policy, especially as the new policy has been introduced well in advance of the start of the next major wage round to rebuild foreign confidence in Britain's ability to deal with its economic problems.

Editorial comment and union reaction to White Paper Page 12

Because of this, urgent discussions are expected this week involving the TUC and the Government over how to sell the policy. In addition, the TUC will be circulating to unions its full document on the development of the social contract, which includes the wage guidelines adopted in the White Paper.

The TUC will also be preparing for talks with the CBI on monitoring the wage negotiations. White Ministers will be turning into official Government policy for operating through the Price Commission on these companies which exceed the policy limits.

Then the TUC and Ministers will meet formally in the TUC-Labour Liaison Committee next Monday, to be followed possibly

by a special meeting of the TUC economic committee in advance of next week's general meeting of the TUC regular council.

This council meeting will provide an opportunity to assess the views of the council members who last week agreed to back the policy by a majority of only 19-13.

Many of the fears among union leaders which gave rise to this narrow vote emerged from the unions which took their decisions over the week-end, and left the Government was not doing enough to help on prices and unemployment.

NUPE, whose general secretary, Mr. Alan Fisher, voted against the policy last week, decided on its opposition path because it fears the impact of possible public expenditure cuts on its members' livelihoods, considers that not enough is being done to curb unemployment, refuses to accept that there should be a real cut in living standards and is also worried about the future of incremental salary scales.

Like the NUT and NALGO, it fears that the rule in the White Paper which has categorised some civil service union leaders as "self-financing" scales can be implemented in addition to the £6 limit is not good enough, because the costs of some scales will have to rise. As a result, Continued on Back Page

Cabinet expects to win backing in Commons

PHILIP RAWSTORNE

ERMENT Ministers, assessing initial reactions to their pay policy, were yesterday confident that the first potential of immediate and determined opposition from Conservatives and the Labour Party had been averted.

Cabinet now expects little difficulty in securing a decisive majority both for the White Paper and the consequent legislation.

Despite strong criticisms of Government measures, Mrs. Margaret Thatcher, the Tory leader, said yesterday that she would not oppose any real effort to combat inflation.

It became clear at the weekend that as long as the Government commanded the majority support of the TUC, the left-wing Tribune group of MPs were likely, for the most part, to hold back from outright opposition.

In these political dangers, the Government's attention at the weekend was being focused on the potential problems for its pay policy.

Harold Wilson is expected to discuss with Cabinet Ministers today or tomorrow the issue of a pay-rise for Mr. The Prime Minister will make a Commons statement before leaving for a two-day

visit to Brussels on Wednesday. Some Labour MPs who had been expecting a pay increase of about 40 per cent. of £1,800, believe that it will now be fixed at a substantially lower rate to set an example to industry.

Mrs. Shirley Williams, Prices Secretary, in a BBC radio interview, pinpointed another of the Government's "prime concerns" — the further inevitable price rises over the next six months. The Government's anti-inflation public campaign will concentrate in its early stages on explaining this aspect, which some Ministers fear could cause rapid strains on the pay policy.

The reserve powers Bill will be published later this week, though it will not be introduced in the Commons.

With it will come legislation for immediate enactment, authorising the Prime Minister to restrict price increases based on excessive wage rises; relieving employers of contractual obligations that would otherwise breach pay limits; and empowering the Government to cut the rate support grants to local authorities which exceeded spending limits.

The Conservative "shadow" Cabinet will decide the Opposition's tactics in the Commons at a meeting on Wednesday after studying the legislation and after taking soundings of Tory backbench opinion at a meeting of the party's finance committee tomorrow.

Though there are demands among some of the party's ardent monetarists for total resistance to the Government's policy, it is expected that the Tory leaders will decide to table reasoned amendments for the debate next week on the White Paper and the second reading of the Government Bill.

This course would enable the party to challenge, as Mrs. Thatcher did at the weekend, the Government's refusal to abandon its nationalisation policies or to tighten further the curbs on public expenditure.

Mrs. Thatcher said that it was "no part of my policy to try to help to create a wholly Socialist Britain"—but she indicated that, despite their doubts, in the short term the Conservatives could not reject out of hand the Government's efforts to tackle inflation.

Tribune Group MPs seem to have been in greater confusion. Mr. Norman Atkins, the group's economic spokesman, said yesterday that he is preparing a report, setting out an alternative policy to that of the Government for curbing inflation by means of import controls, greater restriction of prices, and index-linked wage increases.

Labour document proposes big increase in intervention plans

RICHARD EVANS, LOBBY CORRESPONDENT

CONTROVERSIAL new proposals on economic and industrial planning, which would greatly increase Government powers of intervention in the affairs and management of companies are likely to be presented in this year's Labour Party conference by the party's national executive committee.

They are contained in a confidential draft document, Labour and Industry: The Next Steps, which will be discussed tonight by the party's home policy committee under the chairmanship of Mr. Anthony Wedgwood Benn, the Energy Secretary.

After a further meeting in September, the document will be published before the Blackpool Conference in early October.

A number of recommendations in the document, which was drafted by the predominantly left-wing research department and the industrial policy sub-committee, are likely to cause a fierce argument between the left and the moderates on the home policy committee, who include Mr. Denis Healey, the Chancellor of the Exchequer, and Mrs. Shirley Williams, the Prices Secretary.

In particular the document condemns any form of legal con-

trols over wages and uses on to advocate direct action to restrict imports—a policy so far rejected by Mr. Wilson and Mr. Healey.

Adoption of the lengthy document of the party conference would present Ministers with another confrontation between the Government and the party's rank and file.

Following the proposals in the industrial policy document, the National Enterprise Board and planning agencies for a much sharper emphasis on creating a coherent system of industrial planning.

The document admits that previous attempts at constructing a national economic plan have ended in failure, but claims that the planning agreements system would now make available a flow of reliable information from companies that would make all the difference.

Initially, the plan would be very much less than "imperative" and would seek only to set out the broad strategies to be followed. It would not attempt to lay down targets for companies—what products should be produced, in what volume and in which areas.

It would need to be drawn up in full consultation with both sides of industry and at all levels, and we would aim to get agreement for the programme of action based upon the plan. But if agreement on action was unobtainable the Government would be able, and would need to be prepared to act, using where necessary all the instruments and statutory powers available to it under the system.

Plans would also have to be drawn up for individual sectors of industry, but even more important the Government would have to indicate its views about the relative growth of the different sectors. It would need to ensure that companies responded in a positive way to these national priorities.

The trade union movement should be especially closely involved in the whole planning process, the document argues: first as one of the parties involved in drawing up planning agreements; second, at national level through TUC discussions with Ministers; and regular tripartite talks between the Government, CBI and TUC; third, through informal discussions between trade unions and those involved in drawing up the plans; and fourth, through the economic development committees and the NEDC.

Exxon payments to parties in Italy

BY GUY DE JONQUIERES

NEW YORK, July 13. EXXON REVEALED this week-end that it contributed between \$46m. and \$49m. to Italian political organisations during the ten years up to 1972. It added that \$86,000 of this amount was apparently contributed to the Italian Communist Party.

The company said, however, that it had authorised its Italian subsidiary, Esso Italiana, to disburse only \$27m. in contributions and that the remaining \$19m. to \$22m. had been paid out by a former Esso Italiana employee on his own authority.

Exxon announced at its shareholders meeting last May that it had made political contributions in both Italy and Canada, which it maintained were entirely legal. Details of the payments have not been divulged, but the company gave no clue at the time that the Italian contributions were on such a large scale.

It is clear that Exxon has had difficulty accounting for some of the expenditures and explaining why they were made.

Appearing before the Senate sub-committee on multi-national corporations last week, Exxon's controller, Mr. Archie Monroe, said that Italian contributions had been made "to further the democratic process."

An Exxon spokesman said today that some of the contributions had been made to organisations other than political parties, such as party newspapers, though he would not identify the amounts.

Exxon said that it ceased authorising political contributions in Italy in 1971 after its regional headquarters in London became concerned at the size of such payments.

In early 1972, a special Exxon investigation found that an Esso Italiana employee had made additional, unauthorised contributions and substantial commercial arrangements, payments and commitments over a period of years, the spokesman said. The employee left the company soon after the discovery.

Legal

Exxon has apparently wound up its investigation. But company officials have been summoned to appear before the Senate sub-committee on Wednesday and they will be followed by representatives of Mobil on Thursday.

Mobil has also said that it has made legal political contributions in both Italy and Canada. Another company, Gulf Oil, has admitted contributing about \$8m. abroad, most of it in South Korea, while Ashland Oil has said that it made payments in unspecified foreign countries.

Portuguese bishop leads protesters

BY JANE BERGEROL

LISBON, July 13.

WITH DEEP uncertainty hanging over the future of democracy in Portugal after the withdrawal from the Government by the Socialists, a large scale challenge to the regime was mounted tonight by thousands of Roman Catholic demonstrators in the northern town of Aveiro.

More than 20,000 people gathered to welcome Bishop Manuel Almeida, Trinidad home from talks in the Vatican, and demonstrate support for the embattled Roman Catholic Church in its fight to save its radio station, Radio Renascença, from nationalisation.

Thousands of people gathered in front of the Aveiro railway station and marched with the Bishop at their head, up the three-lined main avenue to the Bishop's palace, carrying banners saying "Radio Renascença belongs to the people" and "Catholics united will never be defeated."

No Copcon security forces were in sight, since Copcon came off the alert earlier today. Nor were any Communist Party counter-demonstrations in evidence. Truck drivers who had transported hundreds of people from neighbouring villages and towns reported no vigilante roadblocks or other way, despite a hysterical Communist Party campaign on national Communist-controlled radio stations against the demonstration which it is branding the work of "reactionary forces."

Hysterical

The Communist campaign of vigilance against a reactionary coup, which has intensified to hysterical proportions over this week-end, threatens to end in a def act, if not de jure, ending of freedom of association in this country.

Meanwhile, Prime Minister Vasco Gonçalves has been seeing Ministers without portfolio in the coalition Government from the three remaining parties, Communists, Communist-dominated MDP-CDE, and Popular Democratic Party, the Cabinet after the Socialist Party's dramatic resignation last week.

It has been made clear that Dr. Mario Soares' post as Minister without portfolio will not be filled, but the Ministry of Justice and five secretaries of state positions have to be filled following the Socialist withdrawal.

No indication has been forthcoming yet of whether they will be allotted on a party basis among the three remaining parties or whether they will go to "independent" third parties. A third possibility is appointment of Armed Forces members to the posts.

Three separate events were the target of Communist propaganda and an hysterical anti-reactionary

campaign, as as a result two of them were cancelled over the week-end. The first was the Confederation of Portuguese Industry's plenary session, which had been due to meet on Saturday afternoon.

It was postponed, ostensibly because delegates to its congress last week had not finished ordinary business in time.

The second postponement came today when small shopkeepers were due to meet to discuss their problems. This was also put off at the last minute because, as the group said: "We want to contribute to serenity at this difficult time."

But the Communist Party had already branded it "a horde of reactionary forces" and had distributed leaflets calling for its cancellation.

The Catholics, however, despite a virulent propaganda campaign against them, have been busy with the Communist-controlled national radio stations, were continuing to flow into Aveiro to demonstrate in support of their Bishop.

A liberal, and chairman of the Portuguese Episcopal Council, he has been in Rome for talks widely thought to be connected with the Roman Catholic Church's stand against nationalisation of Radio Renascença.

A Radio Clube report from the north estimated over 150 trucks laden with demonstrators were making their way along the main road from Coimbra to Aveiro, plus dozens of private cars.

Northern Portugal is already in covert rebellion against Lisbon's radical policies, fundamentally contrary to what conservative northern small farmers and businessmen see as the true course of the April 25 revolution.

The Communist vigilance campaign began 12 days ago when left parties mounted a successful effort to prevent the ousting of Prime Minister Goncalves by moderates in the Supreme Revolutionary Council. The end result of the moderates' unsuccessful attempt was the Monday Armed Forces general assembly's endorsement of a plan for "direct democracy" bypassing the political parties and building an "alliance between the Armed Forces Movement and the people."

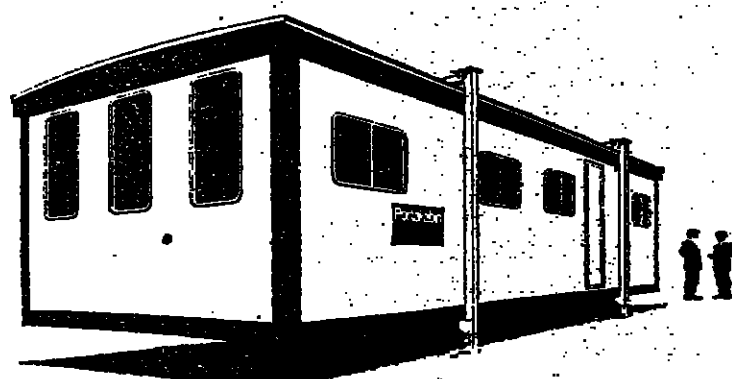
Unknown to the Portuguese, it was the Prime Minister's political analysis, never published here, that pushed the assembly into adopting the plan.

If ordinary people were made aware of this, there would be even more widespread opposition to the plan, since because of General Goncalves' close identification with the Communist Party, it would be seen to be a Communist Party scheme.

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Latest decisions increase employers' legal liability

Watson buries bridesmaid tag

BY JUSTINIAN

IN TWO decisions last week the extent of an employer's legal liability was considerably widened. The first was given last Monday in a judgment of Mr. Justice Donaldson in *Roux International Ltd. v. Lioudi* and the second in a judgment of Mr. Justice Donaldson in *Watson v. Watson*.

Mr. Lioudi had been employed as a sales manager from November 1971 to September 1974 when he was dismissed summarily and given two weeks' salary in lieu of notice. His employers, Roux International, were a company registered in Ireland, with a parent company in the United States, and manufactured cosmetics.

Mr. Lioudi worked from an office in his London home and did a fair amount of travelling to Ireland and on the Continent. He had been engaged by Roux International as a result of an advertisement in a sales magazine for Europe and the British Isles, who would be both based in Britain in Ireland and required to spend "approximately 50 per cent of his time with wholesalers, direct accounts and beauty salons on the Continent and the balance of his time in a similar capacity in Britain and Ireland."

Work abroad

His employers paid that proportion of his National Insurance and in addition his contract entitled him to an expense allowance in Great Britain outside a radius of 50 miles of London and to reimbursement of his bed, food, cleaning bills and transportation outside Great Britain. At the time of his dismissal Mr. Lioudi had returned to London from Sweden to do some paper work and prepare for another journey abroad. Although his employers had told him to spend some time on the Continent and less in London, in fact he never spent more than half of his time working abroad. After his dismissal he applied to the Industrial Tribunal for a redundancy payment.

His employers argued that the tribunal had no jurisdiction to deal with his claim, because most of his work was in connection with activities outside Great Britain. This argument did not convince either the Industrial Tribunal or on a subsequent appeal by his employers, Mr. Justice Donaldson. The decision turned on whether at the time when his employment came to an end, Mr. Lioudi was in Great Britain in accordance with instructions given to him by his employers.

New twist

The second decision affecting employers was made last Wednesday by the Court of Appeal in *Rose v. Plenty*, and added a new twist to the tangled web of an employer's vicarious liability for his employee's conduct. In that case, the Co-operative Retail Services were held liable to pay £920 damages to a boy of 13. At the time of the accident, the boy was helping one of the company's milkmen on his rounds. Notices at the depot prohibited milkmen from taking children

on vehicles. But the milkman, Mr. Plenty, arranged for the 13-year-old boy to help deliver bottles and money at a rate of 30p for week-ends and 20p for week-days. The accident occurred on June 21, 1970, when the milkman drove his float too close to the curb as he went round the corner. The boy was sitting on the float with his legs dangling over the edge; as a result he broke his leg.

The county court judge had awarded damages to the young boy on the basis that the milkman had driven carelessly. The employers appealed to the Court of Appeal on the ground that they were not liable for the milkman's driving, because they had given him clear instructions not to take any child passengers on his milk float. As employers, they were liable for the milkman's acts within the scope of his employment, but the milkman was employed to deliver milk, not to transport teenage children, even if they were helping with the milk round.

Hitch-hikers

This argument appealed to Lord Justice Denning. But he was in a minority of one against two staunch pillars of progress in the law, Lord Denning and Lord Justice Scarman. They ruled that the milkman was employed as a milkman, and that he chose to perform that task by enlisting the assistance of a small boy. This was a way of carrying out the job which the milkman was employed to do. Lord Justice Scarman ruled that public policy suggested that as between morally blameless people who "put the action in motion" should be liable. Lord Denning ruled that nothing was decisive in the fact that employers had put up warning notices, or that the boy was a lawbreaker. The employer's prohibition did not take the milkman's conduct outside the sphere of employment, although it was a nice point as to which side of the line any particular case fell.

If these are the demands of public policy, some employers may feel that the milkman's round has led to a raw, rather than a square deal. If the milkman had given a lift to a hitchhiker, previous decisions indicate that his employer would not have been liable for any accident to the hitchhiker. But what now will be the position if the milkman gives a lift to a hitchhiker when, during the journey, he asks and pays for help in delivering milk and collecting bottles and money? The final answer to this conundrum will be given by the House of Lords, to whom the employers were given leave to appeal.

CARNOSTIE, July 13.

Eagle chip

In my opinion, the most important turning point for the strokey 14th hole for a merrillous eagle. Watson had five times played the 205-yard, par-three 18th in four shots during the championship, and Newton levelled the score here by hitting the green — a feat which has eluded Watson all week — with his three-wood.

At the 17th Watson putted five feet past the hole from 25 yards, but again got in the pressure putt, and so they came to the 18th hole. Watson, who had set this pattern throughout, hit the better drive and a fine second shot to the heart of the green. After Newton had bunkered his two-iron shot short and left.

After Newton had played a fine recovery stroke 10 feet past the hole, Watson putted up to 18 inches, rolled in the second putt to take the match to sudden death for the first time in the history of the championship. Alas for him, Newton aimed at the left lip, expecting it to never move, and the ball had been won and lost in an under-par to level figures — tremendous stuff.

Praise for Alf

Despite his disappointment, Newton will travel from here to the Swiss Open this week. Watson, who has at last shaken off the bridesmaid tag that he had earned for eight of the last two U.S. Open Championships when well in the lead, begins to swing better every day, now that he has changed from trying to hook the ball to the more orthodox and successful left to right movement.

He will play in the Canadian Open at Royal Montreal Golf Club which starts on Thursday week, and I am happy to say that I shall be there to see him. A word in praise, finally, for Watson's marvellous caddy, Alf Fyles, of Southport, who carried the bag of Garry Player for so many years, including the time when he won the Open here in 1968. Fyles also carried for Gay Brewer in two Allcan World Championships wins, and now that he has played no small part in keeping his charge as cool as a cucumber in the final nerve-racking stages yesterday and in the war of attrition of today. Those who regard caddies purely as mindless bag-carriers are very mistaken.

He played no small part in keeping his charge as cool as a cucumber in the final nerve-racking stages yesterday and in the war of attrition of today. Those who regard caddies purely as mindless bag-carriers are very mistaken.

GOLF

BY BEN WRIGHT

CRICKET

BY TREVOR BAILEY

England contributed to their downfall

ENGLAND WOULD already be one down in the Ashes series if the weather had not intervened to prevent the Australians from winning the first Test by an innings and more in under three days.

Now at 935 in their second innings, with all their main batsmen sent back in the pavilion except for Amis, who was forced to retire early and will re-emerge at the fall of the next wicket, nothing but heavy prolonged rain throughout today and tomorrow can save England from another of those humiliating defeats to which we became so accustomed last winter.

What makes the present situation so annoying is the extent to which England have contributed to their own downfall. They put their own batsmen on a firm, dry pitch on an overcast day, with rain forecast for later. They then allowed them to reach 358, when with Greg Chappell out for another total should have been somewhere around the 250 mark.

It was inevitable that England would fall in their first innings, because the wicket was lively — although not impossible — after the rain, but there was no such excuse on Saturday, when they capitulated to the speed of Eillee and Thomson, beautifully supported by Walker.

In Australia, our batsmen were badly shell-shocked by this pair and on the evidence of Edgbaston they have not yet recovered. Fletcher, after a hesitant start displayed some confidence and class towards the end of his face-

save in the main our school, where he acquired the fundamentals of the game. Although a player must obviously have exceptional natural talent to reach the top, batting is not a natural art, but requires a sideways technique that has to be learnt. The Ilford cricket club also took an interest in Graham when he was 14 and his practical encouragement, together with the coaching he received each winter, meant he was better equipped to make runs than if he had simply had to depend upon the cricket he played at Leyton County High School.

His successes assured him a place in the Essex schools' eleven at an early age and later represented the English Schools' both organisations proving extremely helpful. I first bowled against him when he was playing for Ilford in his teens and his potential was immediately obvious. It was not so much the 70-odd runs he scored, but rather the way he made them. When he joined the Essex staff he was a more complete player than most youngsters. This one of the reasons why he has been capped so young for England. He was brought up on the right lines.

If anyone doubts the importance of good coaching in the formative years he has merely to count the number of ex-Millfield boys playing first class cricket in England, we do not overlook outstanding prospects, but we do miss some who are never called up to represent England. I have seen many opportunities on the right lines.

Goach, who had the distinction of acquiring "the" in his first Test, is certainly a fine cricketer, but his father, a keen club who believed in private coaching, never obtained enough school, let alone county, to make a significant contribution to his development.

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YACHTING

BY ALEC BEILBY

Nine chans for a British win in Quarter on Cup series

DEAUVILLE, July 13.

THE SERIES of five races for the Quarter Ton Cup, which starts tomorrow at Deauville, is an international yachting fixture second only in importance to the Admirals Cup series, which begins at Cowes next month. Forty-seven yachts from 12 countries have entered.

Including crews from New Zealand, Japan and the U.S., Britain has nine yachts taking part. They will not race as well as the eventual outcome of the series, but the ability to find all the safety of the courses, the 100-series, but will complete individual races having been set around complicated succession of points in the approaches to Le Havre.

As part of the series, the French offshore racing organisation has presented a secondary trophy for the best team of three yachts from any of the Junior Offshore Group, who arrange the British entry. The British entry, headed by the skipper of the *Admiral's Cup*, is a 200-mile offshore course, which will be sailed on Saturday.

It can be said, however, that the British crews have as good a chance as anyone here, with a wealth of our best talent among the crew lists. Some have been recruited for the event from our Admirals Cup team, Olympic gold medalist Johnnie Walker, who normally crews aboard Robin Aisher's *Yeoman XX*, among them.

The New Zealand crew aboard the *Admiral's Cup*, which sailed on Wednesday, a further interesting sporting occasion, though no one begrudged New Zealanders their success. Official measurers have been checking the yachts to-day to ensure that they conform with the rules which provide for a maximum rating of 18 feet, although a handicap system is applied in the series. Some of the yachts, particularly the Italians, seem to fall short of the normal requirements as far as safety is concerned, one having essential fittings that would hardly be credit to a dinghy.

Points awarded for the races are calculated on a similar basis to that used in the Admirals Cup. The longest races are worth most but at this stage it would be a feat of fortune telling and guesswork to forecast the eventual result.

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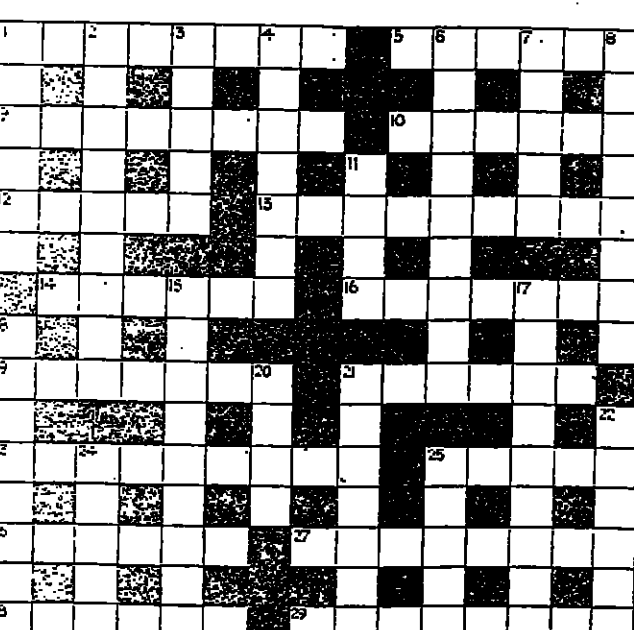
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Radio

- BBC 1**
+ indicates programme in black and white.
- 11.25 a.m. Cricket: First Test, England v. Australia. 1.30 p.m. Andy Pandy. 1.45 News. 2.15 Cricket: First Test, England v. Australia. 4.25 Regional News (except London). 4.35 Play School. 4.50 Screen Test. 5.15 Here Come the Double Deckers. 5.40 Sir Prancelot. 5.45 News. 6.00 Nationwide (London only). 6.25 Tom and Jerry. 6.30 Sportstown. 7.10 Star Trek. 7.15 Mr Honourable Mrs.
 - 8.30 The Likes of... Twiggy. 9.00 News. 9.25 The Monday Film: "The Knack" starring Rita Tushingham. 10.50 Read All About It. 11.20 Weather/Regional News. All Regions as BBC 1 except at the following times: Wales—1.30-1.45 p.m. Pili Pili. 6.00-6.25 Wales To-day. 7.10-7.30 Heddlu. 7.30-8.10 5000. 10.50-11.20 Cwestion Araf. 11.21 News of Wales. Scotland—10.00-10.10 a.m. Wacky Races. 10.10-10.35 Robinson Crusoe. 10.35-11.00 Vision On. 6.00-6.25 p.m. Reporting Scotland. 11.21 Scottish News Summary.

F.T. CROSSWORD PUZZLE No. 2,828



- ACROSS**
- A girl gets excitement in Yugoslavia (8)
 - Boast about the account in Poland (6)
 - I want one small dose inside me for my headache (8)
 - Artist gets in a remedy for poison (5)
 - Early change of heart (5)
 - What someone had done at Balaclava (9)
 - To cope a fellow has to grow older (8)
 - Promotion for marshal in a London borough (7)
 - The states we have one word for (7)
 - Spirit with greedy return in 17 (8)
 - Film star needs a nine volt (8)
 - Rubbish sent back this way in a trunk (5)
 - Spice for Margaret? (8)
 - Herb is a blacking with debts (8)
 - Has a nose for money in the ship (8)
 - Team with money has connection with stars (8)
- DOWN**
- Ancient city comes up in my remembrance (6)
 - A dark horse? You must be dreaming (9)
 - Tea in an auction is not fresh (5)
 - Counselled — ease and peaceful slowness (11)
 - Curious has 18 holes with the Principals (7)
 - Railway supporter in seat of authority (5)
 - Six out of seven are for four (8)
 - Dashed off for shares (4)
 - Latin G-men show the way of adjusting (9)
 - Not again, as the raven said (8)
 - Upstairs at face value on the planet (8)
 - Bureau direction in assistance (4)
 - Communists come up with an old letter for a pasta dish (7)
 - Learner follows the code just for a bit (8)
 - Toni made up of French and English articles (5)
 - Mountain index (5)
- The solution of last Saturday's prize puzzle will be published with names of winners next Saturday.

- Northern Ireland**—1.23-1.25 p.m. Northern Ireland News. 6.00-6.25 p.m. Scene Around Six. 11.21 Northern Ireland News Headlines.
- England**—6.00-6.25 p.m. "Look North" from Leeds, Manchester, Newcastle. 7.10-7.30 5000. 10.50-11.20 Cwestion Araf. 11.21 News of Wales.
- Wales**—1.30-1.45 p.m. Pili Pili. 6.00-6.25 Wales To-day. 7.10-7.30 Heddlu. 7.30-8.10 5000. 10.50-11.20 Cwestion Araf. 11.21 News of Wales.
- Scotland**—10.00-10.10 a.m. Wacky Races. 10.10-10.35 Robinson Crusoe. 10.35-11.00 Vision On. 6.00-6.25 p.m. Reporting Scotland. 11.21 Scottish News Summary.
- BBC 2**
- 7.05 a.m. Open University. 11.00 Play School. 4.30 p.m. Cricket: First Test, England v. Australia. 4.35 Play School. 4.50 Screen Test. 5.15 Here Come the Double Deckers. 5.40 Sir Prancelot. 5.45 News. 6.00 Nationwide (London only). 6.25 Tom and Jerry. 6.30 Sportstown. 7.10 Star Trek. 7.15 Mr Honourable Mrs.
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- ANGLIA**
- 1.25 a.m. Anglia News. 1.30 Look West. 2.30 a.m. Anglia News. 3.30 Monday Morning. 4.30 a.m. Anglia News. 5.30 a.m. Anglia News. 6.30 a.m. Anglia News. 7.30 a.m. Anglia News. 8.30 a.m. Anglia News. 9.30 a.m. Anglia News. 10.30 a.m. Anglia News. 11.30 a.m. Anglia News. 12.30 a.m. Anglia News. 1.30 a.m. Anglia News. 2.30 a.m. Anglia News. 3.30 a.m. Anglia News. 4.30 a.m. Anglia News. 5.30 a.m. Anglia News. 6.30 a.m. Anglia News. 7.30 a.m. Anglia News. 8.30 a.m. Anglia News. 9.30 a.m. Anglia News. 10.30 a.m. Anglia News. 11.30 a.m. Anglia News. 12.30 a.m. Anglia News. 1.30 a.m. Anglia News. 2.30 a.m. Anglia News. 3.30 a.m. Anglia News. 4.30 a.m. Anglia News. 5.30 a.m. Anglia News. 6.30 a.m. Anglia News. 7.30 a.m. Anglia News. 8.30 a.m. Anglia News. 9.30 a.m. Anglia News. 10.30 a.m. Anglia News. 11.30 a.m. Anglia News. 12.30 a.m. Anglia News. 1.30 a.m. Anglia News. 2.30 a.m. Anglia News. 3.30 a.m. Anglia News. 4.30 a.m. Anglia News. 5.30 a.m. Anglia News. 6.30 a.m. Anglia News. 7.30 a.m. 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Covent Garden

The Royal Ballet

by CLEMENT CRISP

For anyone in doubt about the present stature and achievements of the Royal Ballet the performances at the end of last week, when the company returned to the Royal Opera House, were more than reassuring. On Friday and Saturday evenings I saw *Les Noces*, *Four Seasons*, *Pieces* and *The Four Seasons* magnificently danced, and I do not know of another company able to encompass the ritualistic splendours of the first and the virtuosity of the second, or capable of transcending the impetuosity of the third, with such mastery.

Four *Schumann Pieces* is Hans van Manen's tribute to Anthony Dowell, and though I have little sympathy with its manner — too dandy, emotional, too repetitive in language — it is made to seem more than valid by Dowell's tremendous presence. He is a great dancer, in whom movement is powerful, sensitive, aristocratic. Largeness of impulse, thrilling momentum in action, are most beautifully controlled by his artistry. As with the finest calligraphy, where one can sense the weight

The Entertainment Guide is on Page 8

of ink on the brush that has shaped the ideogram and given it vitality, in Dowell's dancing we can appreciate a similar richness of dynamics and a freshness of statement, as he draws long phrases of movement.

But to applaud a good deal of gimcrack emoting onto the choreography, as van Manen does in the third movement, is to muddy the issue, though he said that he gives Dowell some wonderful things to do, not least in the end of this same section, when Dowell is poised to perform a magnificent upward-reaching arabesque, then sinks slowly to the ground without breaking the body's tension.

Very different, Kenneth MacMillan's tribute to his company in *The Four Seasons*. Here the choreographer is able to show off his dancers in a variety of happy ways.

Their musicality (just how musical they are one appreciates at the end of an evening which demands this quality above all else), the precision and uniformity of style, the high standards of the corps de ballet, are explored in the opening ballet, now advantage-

American Embassy

Young America

by WILLIAM PACKER



Winslow Homer: Fox Hunt

The Americans, not unnaturally, are about to remind us that it is all but 200 years since they took independence upon themselves, and this small but distinguished exhibition comes as a prelude to next year's celebrations. It remains in Grosvenor Square until July 28, and then travels to Glasgow and Bristol before returning to America in December. The Pennsylvania Academy, America's oldest fine art museum and school, is preparing to mark its own centenary, a happy coincidence, and, undergoing extensive restoration and, I suppose, refurbishment, has taken the opportunity to make as much as possible of its collection available for loan elsewhere. The 48 paintings now on show at the Embassy come by courtesy of this generous policy.

The exhibition is called "Young America, placing the emphasis firmly on the post-colonial experience. Even the few paintings by living artists seem rather self-consciously and affirmatively American. This is hardly surprising, for the establishment of an authentic identity is a natural and important concern for any emergent nation, as we know all too well to-day.

From our own point of view, of course, such a recent colony, built from nothing, whose culture was fundamentally our own transplanted, must suddenly have seemed desperately provincial; a defensive and reassuring response, which the Monroe Doctrine must have done everything to encourage. But provincial does not always mean bad, and this show clearly demonstrates how good so much American painting has been.

Besides, there has always been a healthy cosmopolitan strain in the American arts, drawing writers and artists, if not always to England, at least to Europe; and though their work has always borne the mark of new experiences and new frontiers, with all the vitality of an expanding society, it has remained intelligently and critically aware of other influences.

In recent years it has been our lot to forget these earlier achievements, so overwhelming has been the effect of post-war American painting. There has been a degree of over-compensation in America's efforts to join the world's cultural stage, hence our own late accusations of cultural imperialism. The reality is that the work is good enough to claim its own place, and always has been.

Not everything here is a masterpiece: the large Benjamin West of Penn's Treaty with the Indians is laboured, dull and unconvincing, full though it is of anecdotal interest, and next to it Stuart's portrait of Washington in old age, the Lansdowne Portrait, is disappointing. But opposed to them, and dominating the entrance to the building, is Charles Willson Peale's portrait of Washington at Princeton, a fine painting in the high English 18th-century tradition.

There are others too for which we would readily make great claims, were the artists who made them our own. With Sargent, as with Whistler, this is almost the case already; and Sargent's lovely early portrait of Mr. and Mrs. Field, modest, delicate yet full of authority, and handled with real virtuosity, for me is the best painting in the show. But George Bellows and Edward Hopper are also important artists, both worth appropriating were it possible, both represented here by strong and distinguished works. And there is Winslow Homer, whose *Fox Hunt* provides one of the most memorable single images to come out of the nineteenth century.

Greenwich Theatre

All's Well That Ends Well

by MICHAEL COVENEY

Jonathan Miller has removed himself to Greenwich and is directing a Shakespearean brace with sudden inhalations and trembling gestures; and finally, *Measure for Measure* opens next month. *All's Well* as bait to rouse Bertram's lust, introduces us with cool solemnity to the major issues of both plays. Helena, an orphan with a noble upbringing, has fixed her sights on Bertram, a French Count, and the exercise of a magical healing power over a pained monarch wins her a free choice of vassal. Bertram recoils as the finger points, making for the wars with a casual promise to recognise the status of his spouse should she ever obtain his ring and bear him a child.

A combination of cunning and faith carries Helena to her objective. First she impresses the widowed Countess (who drawn like an admiring school-boy from a tower form. Although mother and Bertram's blood mother) that her love is true; or rage at being a pawn in the King's game of promises, we do sense that a giggling conspiracy to escape the wife is as much a good wheeze as a nice idea between friends.

The exhibition of *Parables* and genuine admiration scaled in a his "fine" words is powerfully

handled, the victim subjected to a sneering assault as he kneels, blubbering and blindfolded. But Mr. Horovitch fails to register any persuasive passion at this revelation and glumly accepts it, almost as grudgingly as he does the evidence of Helena's persistence. And the conclusion of the play is acted with puzzling facetiousness: Miss Wilton turns to greet the old Countess (Sylvia Coleridge) with a forced show of affection instead of deep relief at finding her "mother" alive and well on her return from the Pilgrimage; the King closes the proceedings with a quick shrug that implies he's understood not a word that's been said, let alone the devious means adopted for reaching happy ends.

Patrick Robertson's set is a solid, dull brown screen that propels the action well forward on to the small thrust, and a solitary bench serves for one and all. The company is not a particularly strong one, but Anna Wing is a spirited Widow and David Keneid a mercifully soft-spoken Count. Kenneth Macmillan's costumes are excellent.

Sadler's Wells Theatre

Table

by CLEMENT CRISP

The eponymous table of Cliff Keuter's ballet, receiving its London premiere on Thursday, is there on one side of the stage. Reclining on it, like the Rokeby Venus cramped for space, is Julia Blaikie.

On the other side of the stage is Christopher Bruce in front of a nasty little chair. Behind him a handsome painted set by Walter Noble, featuring two line drawings — one of a man, the other of a woman — and a lighted grille gleaming behind the backcloth. We are, we may suppose, in domestic territory, and sure enough the choreographer action finds them involved in one of those inexpressibly tedious encounters that suggest that married bliss is a fiction perpetrated by romantic novelists, and that the real world is all squabbles and reconciliations and a good deal of picking at the partner's nerve-ends.

So it may be, but it makes Happily the evening contains

more rewarding pieces. An injury to Blake Brown has obliged Christopher Bruce to recast his *Duets* for two couples instead of three, but it suffers not at all thereby. It is a work of serene delights — Kramers' *Dances* at *Gathering* — and Rob Smith and Sally Owen, Joseph Seguito and Julia Blaikie move with ease and finesse through it. Largely concerned with canonic form, the choreography is rich in visual pleasures, especially for me, in the cunning way Bruce organises the dance so that poses and moments of repose are matched and contrasted.

The other novelty was a revival, handsomely re-designed by Nadine Baylis, of Glen Tetley's *Freefall*. With its passions and aggressions excellently revealed by a fine quintet of soloists, it makes a welcome return to the repertory.

Wimbledon Theatre

The Bacchae and The Beanstalk

Last things first. The silent pantomime contrived by Edward Petherbridge in this Actors Company production takes the left over image of Dionysus, a splendidly gilded pyramidal costume topped by the horned god, and uses the circus clowns to daub the divine face with paint. The costume is then hoisted away and the rest of the pierrot figures appear huddled from beneath it. The gesture is a typical one of the Actors Company. They seem to bring an unusual and potent sense of illusion to performance, at the same time giving an exemplary demonstration of economy in staging.

The manner, for instance, by which the comic preamble of Jack and his mother (played by Sharnne Duce and Keith Drinkel) is transformed into Jack's pursuit by the giant, is one of pure theatricality. Miss Duce, who is a brilliant mime, paces

the vast stage at Wimbledon to highlight her fear, while a series of figures with open umbrellas passes quickly in front of our eyes, the nonchalance and innocence of the image reinforcing her fear. This divertissement ends with Jack beheading the giant and the company dancing round a maypole crowned with the giant's severed head. In such a way does Mr. Petherbridge uple the it in with the evening's main offering, that of Pentheus' horrible punishment for offending Dionysus.

The *Bacchae* (again inventively directed by Mr. Petherbridge) also serves to test the basic acting resources of this company to good effect. The *triteous* and *ru* of Wimbledon has only a few hollowing cloths and ropes suspended above it, which are suitably shaken at a moment when Dionysus breaks free from captivity. But other-

wise all is bare. Sheila Reid and Sharon Duce lead a chorus of six followers of Dionysus who orchestrate fully both the text and the underlying physical moods. Gary Raymond as Dionysus has a resounding and statuesque delivery; the way he transforms by guile the arrogant Pentheus (Keith Drinkel) into a woman, is one of many exciting moments. The short scene played between them is a cunning stroke of sexual humiliation.

Tetrasias (Charles Kay) appears looking possibly too much like the Wizard of Oz, but the merry dance he performs with Cadmus (Ralph Michael) in the music of the Pink Floyd (or is it the Tangerine Dream?) is in keeping with the exotic favours of the stage.

GARRY O'CONNOR

Albert Hall

Beethoven festival

by DOMINIC GILL

To welcome their new conductor, Antal Dorati, who took up his appointment last Friday, the Royal Philharmonic Orchestra are offering with him this week and next at the Albert Hall a "Beethoven festival" of seven concerts taking in all the nine symphonies, the six concertos, and five overtures.

Friday's concert was neither a particularly promising, nor a notably inauspicious introduction. In Beethoven's first and fifth symphonies Dorati drew some agreeable playing from his orchestra in a manner which permitted at least of no significant lapses — no nonsense and entirely capable. But the two performances were otherwise remarkable, neither seriously good, nor seriously bad.

Beethoven's symphonies call for a great deal more than that; and no doubt Dorati will (for we know he can) give more, as he warms to his task, and to the

half. It was left to Murray Perahia, meanwhile, to provide the evening's breath of truth, his French and Italian, a beautiful concert, alive with subtle detail in every bar, of the B flat piano concerto No. 2. Most memorable, the variety of texture in the first movement, the articulation of semiquavers, and semibreves, a big, strong cadenza; the adagio's ringing cantabile tone, its melody shaped with marvellous intensity and concentration; and in the finale, finest of all, a brilliant canvas of colours, a gossamer strands, inner voices in urgent conversation, radiant double octaves.

Every evening brings a different soloist: to-morrow, with the seventh symphony, it was Vasily in the C minor concerto; on Thursday, with the Pastoral, Moura Lympany in the C major; and on Saturday, with the Fourth, the violin concerto and Yehudi Menuhin.

Covent Garden

Così fan tutte

by MAX LOPPERT

A brief note of welcome for Stuart Bedford, conductor of the last two performances in the current Così revival at Covent Garden. On Saturday afternoon, he managed to impose an entirely fresh and natural accent on the music, a production whose jokey symmetries and intricacies have tempted others to prattle or force the pace. From the overture there was unfailing communication, in the delineation of rhythm and weight of phrase, a feeling for balance: the music could take its own breath, unexaggerated liveliness and tenderness could both find just expression. The orchestra and the ensemble were, a few stray moments apart, so securely bound that unhappy occasions

past with under-rehearsed second conductors struggling vainly to make their mark were quite forgotten.

It is a fine revival. The garden set looks ravishing. When a Così cast has worked itself into a state of responsiveness both sharp and comfortable, the experience is rewarding beyond any individual contribution, even beyond a style of production whose excesses could do with firm pruning. (Must the departing lovers march to the beat of the *Quattro* like toy soldiers?) A special pleasure on Saturday was the way gentle, mature irony no longer sits on Richard Van Allan's Alfonso as a lesson learnt: it is now a rounded, witty and wise performance.

Theatre round-up

Actress Angela Baddeley will making their debut at the Palladium over the role of Madame Arnel from *Hermione Gingold* in *A Little Night Music* on September 9, at the Adelphi Theatre.

Miss Baddeley created the role of Mrs. Bridges in the television series *Upstairs, Downstairs*. Alan Bates is to star in *Otherwise Engaged*, a new play by Simon Gray, which will open at the Queen's Theatre on July 30. Also appearing in the cast are Nigel Hawthorne, Julian Glover, Mary Miller, Benjamin Whitrow, Ian Charleson and Jacqueline Pearce.

Pup singer Lulu is to star as Peter Pan in Sir Robert Helpmann's £100,000 production at the London Palladium next Christmas. Actor Roy Moody will play the part of Captain Hook. Both he and Lulu will be

Arts news in brief

John Tavener's large-scale choral and orchestral work, *Ultima Rites*, will receive its first British performance on Wednesday July 23 at 7.00 p.m. in Winchester Cathedral as the opening concert of the 1975 Southern Cathedrals Festival.

The performance will be conducted by the Festival Director, Martin Neary. At 8.30 on the same evening the composer will discuss the work in public with the musicologist Stephen Walsh.

The first London performance of *Ultima Rites* will take place on Friday September 12 in Westminster Cathedral as part of the Promenade Concerts.

On Saturday mornings in July and August at 10.30 a.m. members of the Royal Shakespeare Company will hold informal programmes, including workshops and discussions on plays in the current repertoire, at The Other Place in Stratford-upon-Avon.

Programme details: July 19: *Shakespeare's Actor*. August 9: *A Rumble at The Other Place*. August 23: *Henry V Workshop*.

There will be free entertainment every day between 1 and 2 p.m. until September 12 under

the portico of St. Paul's Church, Covent Garden. This is the locale of the opening scene in Shaw's *Pigmalion*.

The street will be closed to traffic, and each week a different group of players will present a show. Events will range from free-acting and juggling to African music and historical drama. They will be presented by Alternative Arts for the Covent Garden Community Arts Committee, and supported by the Arts Council.

Agatha Christie's play, *Murder at the Vicarage*, with Barbara Mullen as Miss Marples and Derek Bond, will open at the Savoy Theatre, on Monday, July 28. The production, which has completed what the producers call a "record-breaking" tour of Great Britain, also includes Mervyn Pascoe, Derrick Gilbert, Morfy James, Carole Turner, Carolyn Moody, John Rudling and Carole Raymond.

The National Youth Theatre celebrates its first four years at the Shaw Theatre, Euston Road, N.W.1, tonight, by presenting *Max Wall* in his one-man show, *Aspects of Max Wall*. This is being staged for a season prior to the opening in August of the NYT's 20th summer season.

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HOME NEWS

Disarray in air fares highlighted by report

BY ARTHUR SANDLES

SERIOUS concern in the travel industry over "discount" airline tickets is likely to be deepened by a report out today which shows very large differences between the mileage rates on various routes, and big gaps between high and low official and unofficial fares on the same routes.

The report shows, for example, that unofficial discount agencies commonly known as "bucket shops" regularly sell airline tickets at a 33 per cent discount and more. Even the official scheduled fares on sale to the public vary from a little over 3p a mile to 9p a mile.

There has been an outcry recently within the travel industry as agents have demanded some form of Government action against discounting. However, a surfeit of airline seats and a measure of desperation among airlines seems to be increasing the practice rather than reducing it.

Discounting has largely disappeared on the North Atlantic route with the introduction of Advance Booking Charters. It is, nonetheless, widespread on many other routes, notably to the Middle East, the Far East, South America and Africa.

The report, prepared by Crayston Travel Research, says that when the research was done earlier this year a fare of £90 was quoted for a flight to Cairo compared with the "official" lowest fare of £172.

To Bahrain, the rate was £205, against £384 in printed tariffs.

Intermediate

The report points out that there are ways of getting low fares without buying from the bucket shop. By buying ABC tickets to the Caribbean or North America, the normal traveller can then buy onward tickets to South America and save more

than £300 on his flight to Santiago and more than £100 on a route such as Buenos Aires.

Lower fares can be obtained on many routes by going via low-cost intermediate points, notably Luxembourg and Singapore. At the time research was done, a traveller could save nearly £400 on a flight to Singapore.

Discounting can arise when an airline is so keen for business that it is prepared to write a ticket for £400 and sell it for £200 to a travel agent, who then sells it to the public for £350. It is comparatively rare for the major airlines to do this.

The report is likely to add weight to the argument that international air fare structures are now hopelessly disorganised.

U.K. Overseas Air Fares, £12.50, Crayston Travel Research, 3 Maranda Court, New Road, Ham, Richmond, Surrey.

Some private steel companies 'may go to wall'

BY OUR SHEFFIELD CORRESPONDENT

SOME PRIVATE SECTOR steel companies may "go to the wall" during the recession, Mr. Peter Edwards, chairman and managing director of Dunford Hatfield, said at the week-end.

His group operates two of Sheffield's largest independent steel works.

Mr. Edwards wrote to the group's 5,500 workers in Sheffield and Rotherham that steel makers were suffering from low order books and rapid cost inflation.

Some companies would soon find it difficult to meet wage and salary bills without drastic cuts among both workers and staff.

Employees could help to ensure the survival of their company by strict attention to cost-cutting and a careful watch on the level of stocks of raw material

and semi-finished work.

It was also vital that delivery targets were met and administrative efficiency maintained at a maximum.

"There must be no interference with production in any area, for any reason, when work and materials are available."

The Dunford Hatfield and Brown Bayley plants operated by the group make up Britain's biggest independent alloy steel production unit. They also have forging and engineering interests.

Forging orders, which invariably have a different cycle to that of steel being beginning to weaken, Mr. Edwards said. He did not expect any major upturn in the demand for steel until the first quarter of next year at the earliest.

BSC says that Sheffield plan will cost 40% more

BY OUR SHEFFIELD CORRESPONDENT

THE BRITISH STEEL Corporation's special steel division confirmed during the week-end that inflation had pushed up the cost of its Timely Park stainless steel development by 40 per cent in less than a year.

Up-to-date costings for the project, which will more than double stainless steel production capacity in Sheffield, suggest that the scheme will cost £85m. When the scheme was launched late last year, BSC officials put a £60m tag on the three-year development.

The eventual cost, allowing for some improvements to the original plan, could be more than £100m.

It is well advanced on the initial stages of the development and a second rolling mill, costing more than £2m, and a new elec-

tric arc furnace are now under order.

The main objective of the development centre, on existing BSC sites in Sheffield, together with some development at Pateley in South Wales, will be to win back some of the home market in stainless steel flat products now held by overseas producers.

The development has coincided with one of the worst slumps in flat products demand for years. For much of this year the main BSC mills at Shephoote Lane have been working at only half capacity.

This week, one of the BSC's key Sheffield producers of bulk alloy and stainless steel, its Stocksbridge melting shop and primary mill, is out of production entirely to adjust output to low demand levels.

German envoy sees some hope for U.K. economy

BY ARTHUR SANDLES

A LITTLE cautious optimism about the British economy, at least compared with that of West Germany, is shown in the comments of Herr Karl-Günther von Hase, the new West German ambassador to Britain, reported in the latest issue of the Institute of Directors' journal, The Director.

Commenting on Britain's future, he says: "You are a nation that is intact. On the surface, we may look nothing but a successful nation, but beneath the surface I think there is also some doubt and uncertainty about ourselves which you don't have in the same way."

In addition, we have also economic and political problems, a divided nation, and we have borders with the Communist world and 2m. foreign workers.

"Weigh them against your problems—you've had no economic miracle; you've not yet adapted to the change from Empire to European power; you have the problems of a developing region; but I think your problems are in the long run more curable than ours."

More comment on the British economy comes in the magazine from Mr. Jan van den Berg, head of the London office of American management consultants McKinsey. He says that British should start looking on the brighter side instead of being too eager to write themselves off.

He suggests a tax system which should be more encouraging of success.

Dalgety team wins management competition

By Michael Dixon, Education Correspondent

A FOUR-MAN team from the Dalgety group this week-end won the £200 National Management 'Plate' competition, beating a woman and five men from the Midland Bank in Leeds by a profit margin of £555,000.

Five past and present staff of accountants Kinnie Ross, who took third place in the computer-based competition which was introduced this year for teams which had been knocked out in the first round of the U.K. management championship, et al. shrilly in the Financial Times, I.C.I., and the Institute of Chartered Accountants in England and Wales.

The Plate winners are Christopher Buckmaster, John Handford, Kevin Walsh and Graham Turner, who played under the team name of Chisnall—an exotic bull noted for being strong in the withers. The Dalgety group's chairman is Mr. Rupert Withers.

British Gas plans £100m. southern pipeline extension

BY RAY DAFTER

BRITISH GAS is to spend a further £100m. on its natural gas pipeline system. A 200-mile extension is planned for its southern feeder network.

The announcement comes just over a week after British Gas said that it was to spend £100m. on a new land pipeline to distribute gas from the northern sector of the North Sea.

The southern project will line being laid between points near Wisbech and Winchester. From Winchester, one branch of the pipeline will run westward into Dorset. A possible future branch, to run eastward into Sussex and Surrey, is under consideration.

British Gas said at the week-end that the increasing demand for gas in southern England was met during the foreseeable future.

Construction is expected to start next year with a start-up date in the late summer of 1977.

At points along the new pipeline, gas will be taken off to feed the local distribution systems. Eventually there will be a need for four compressor stations to ensure that, as demand for gas increases, the capacity of the pipeline can be stepped up.

The stations will be spaced at intervals along the pipeline. In addition various types of smaller above-ground installations will be needed along the route.

British Gas said the compressor stations would not be required in the early stages of the pipeline's operations.

The corporation has already begun consulting landowners, tenants and other interested parties along the route.

Ulster Convention failure forecast

BY GILES MERRITT

BELFAST, July 13

ULSTER'S ORANGE Order yesterday celebrated the 25th anniversary of the Battle of the Boyne in peaceful and even carnival mood as a prominent Vanguard Party leader bluntly forecast the failure of the Constitutional Convention.

Although the Convention, which was elected here on May 5 as Ulster's latest chance of finding a constitutional solution to its problems, is in summer recess until mid-August, there is little doubt that its fate is largely being fashioned now.

Leaders of the Loyalist coalition majority are preparing to take up their autumn positions. Mr. Ernest Baird, deputy Vanguard leader, told an Orange Day meeting at Clogher that the Convention's hopes of reaching an agreed solution were "impossible".

Westminster's insistence on power-sharing by Northern Ireland's Catholic minority in any future form of devolved government was the stumbling block to the Convention's success.

Power-sharing

Mr. Baird's forthright prediction of the Convention's breakdown, which in spite of that body's slow and uncontroversial start reflects the generally-held pessimistic view—was not, however, entirely shared by two other Loyalist leaders.

The Rev. Martin Smyth, who as Imperial Grand Master of the Orange Order, presided over yesterday's mass marches and meetings and who is also an official Unionist Convention member, said that he believed the Convention could succeed in crafting a widely acceptable form of government.

Chemical group favours Industry Bill changes

BY RAY DAFTER

THE CHEMICAL industry has welcomed amendments to the Industry Bill which require the Government to provide more information for proposed planning agreements.

The Chemical Industries Association has written to member companies that the amendments should pave the way for a constructive dialogue with the Government and encourage Whitehall to maintain a consistent policy in its subsequent treatment of the industry.

This would seem to be most important to an industry such as ours which generally has to work on a long time horizon," says Mr. Martin Trowbridge, director general.

It was regretted, however, that the Government had not yet accepted the industry's view that the National Economic Development Office and the what information should be passed to employees.

Any appeal about the amount of disclosed information would be put to an advisory committee—a "fairly well balanced" body.

National Coal Board awards £5.7m. orders

NATIONAL COAL BOARD contracts totalling about £5,700,000 have been awarded for colliery trailing cables to A.B. Bleydy, of 12 Solihull Road, Radcliff, Leicestershire; Crompton Parkinson, Derby; Delta Enfield Cables, Charlton, SE7; and Pirelli General Cable Works, Southampton.

SANDERSON (FORKLIFTS), Skegness, has received an order for forklifts worth about £500,000, from George Wimpey and Co.

HEENAN ENVIRONMENTAL SYSTEMS, Worcester, has been awarded an order by Materiel Recovery for the manufacture and erection of a pilot plant to extract tars from municipal refuse for subsequent processing in the Batchelor Robinson continuous de-tarring plant at West Hartlepool. It will be erected in the Benwell depot of the Tyne and Wear Council at Newcastle-upon-Tyne and is due to commence operating in January.

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Hayek prescribes sharp shock therapy for West economies

BY WILLIAM KEEGAN, ECONOMICS CORRESPONDENT

WESTERN ECONOMIES must achieve a dramatic reduction in the rate of growth of money supply if they are to avoid sinking eventually into a 1930s style depression, according to Professor F. A. Hayek, the Austrian economist and Nobel prizewinner in 1974.

In a new pamphlet out today Professor Hayek argues that inflationary policies are destined to produce much more severe unemployment than that experienced so far. The stark choice is between some unemployment now and more severe unemployment later, he asserts.

"What I fear above all is the apathy, not a deluge attitude of the politicians who in their concern about the next elections are likely to choose more unemployment later," Hayek warns.

most harmful effects of inflation are disregarded, namely, "the misdirection of resources it causes and the unemployment which ultimately results from it."

Unbearable

While writing about the West generally, Hayek makes it clear he has an eye on the country where he spent a large part of his professional career—the U.K.

He attacks the "Keynesian" inheritance, says the present inflation "has been deliberately brought about by Government on the advice of economists", and that "what these economists overlooked was the purpose which they approved (monetary expansion to stimulate employment) required an accelerating inflation, and that any acceler-

ing inflation sooner or later becomes unbearable."

But Professor Hayek has a good word in reserve for the U.K. He describes a recent speech by Mr. Denis Healey as "encouraging" when he said "it is far better that more people should be in work, even if that means accepting lower wages on average, than that those lucky enough to keep jobs should scoop the pool while millions are living on the dole."

"It would almost seem," Hayek comments, "as if in Britain, the country in which the harmful doctrines originated, a reversal of opinion were now under way. Let us hope it will rapidly spread over the world."

Full Employment at Any Price? F. A. Hayek, £1, Institute of Economic Affairs, 2, Lord North Street, London, S.W.1.

U.K. joins tripartite £10m. coal plan

BY DAVID FISHLOCK, SCIENCE EDITOR

A TRIPARTITE plan to fund a £10m. experiment in advancing coal technology, to be carried out at a British colliery, has been agreed between Britain, the U.S. and West Germany.

The partners will design and build a large experimental fluidised-bed furnace operating under pressure, to explore this method of coal utilisation.

The scheme was agreed at a meeting of the working group on coal of the International Energy Agency's research and development committee, in London last week. If all goes smoothly, the three partners hope to launch the project in October, and place the first contracts next spring.

said Mr. Leslie Grainger, the NCB's member for research, yesterday.

The experimental rig will be built at Grimethorpe Colliery in Yorkshire, where the NCB once had plans to construct a 20MW prototype power plant using a fluidised-bed boiler. It will involve a furnace of the same size as the original plans, about six feet square in area, and will cost an estimated £6m.

If the project proceeds, it will launch the first component of the three-part, long-range development programme agreed in the coal industry examination last year between the Government, the miners and the NCB.

Commenting on Britain's future, he says: "You are a nation that is intact. On the surface, we may look nothing but a successful nation, but beneath the surface I think there is also some doubt and uncertainty about ourselves which you don't have in the same way."

In addition, we have also economic and political problems, a divided nation, and we have borders with the Communist world and 2m. foreign workers.

Public inquiry into plans for Bow Lane

Financial Times Reporter

PLANS FOR THE demolition of 6, 7 and 8 Bow Lane, one of the City's remaining narrow streets of character, are to be the subject of a public inquiry. Bow Lane Developments has appealed as a result of the City Corporation's failure to decide within the prescribed period on an application for listed building consent and the erection of a six-storey development for shops, offices and showrooms.

The inquiry will open at the Guildhall, West Block, on October 7.

Among the more important visits to-morrow will be one to British Rail's technical centre at Derby where the experimental version of the Advanced Passenger Train (APT) was developed. At Derby the visiting group led by Mr. Ali al Sayed, Minister of State for Transport and Communications, will view the latest research projects, including track construction and maintenance and work on train control.

The delegation will also have a tour in the High Speed Train (HST), also developed at Derby and now undergoing passenger-carrying trials in the BR Western Region.

The visitors will also see the re-signalling scheme at London Bridge station, the Metro-Cammell carriage and wagon works at Birmingham and two GEC plants at Manchester and Preston respectively.

HOTPOINT TO SHED 150 EMPLOYEES

By Our Peterborough Correspondent

About 150 white-collar workers at the Hotpoint electrical appliance plant in Peterborough are to lose their jobs because of administrative reorganisation. The redundancies will involve all departments except the computer section.

Cheque clearings up in June to £150bn.

BY DONALD MACLEAN

CHEQUES PASSED through the Bankers' Clearing House in June were 14 per cent higher than the previous June, at £149,718bn., and showed a substantially faster rate of growth over the respective corresponding 1974 figure than was seen earlier in the year. 1975, there was a sharp jump on over the first-half of the year, each such count in the Town there was an increase of 2.5 per cent, to £289,650bn. The table large financial transactions of below shows that while turnover the City.

INTER-BANK CLEARINGS AT BANKERS' CLEARING HOUSE			
	June, 1975	June, 1974	Change
Credit clearing	£m.	£m.	%
Debit clearing:			
Town	134,380	118,337	+ 13.6
General	15,338	12,036	+ 27.4
Debit total	149,718	130,373	+ 14.8
Jan.-June, 1975		Jan.-June, 1974	
Credit clearing	£m.	£m.	Change
Debit clearing:			%
Town	798,960	790,545	+ 1.1
General	90,690	77,614	+ 16.9
Debit total	889,650	868,159	+ 2.5



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Inside.

Inside this Rolex Oyster case, there's a hand-tuned rotor self-winding movement called, with good reason, the Perpetual. You never have to wind it up. Nor does it have a battery to run down.

Before this movement is placed within the safety of its Oyster case, we submit it to an independent body called the Swiss Institute for Official Chronometer Tests.

Here, for fifteen days and nights, the accuracy of the movement is subjected to the most rigorous series of tests. Hung in every conceivable wrist position, in varying temperatures, the movement has to achieve a remarkable degree of accuracy before it can be officially certified as a Chronometer.

This is a title the Swiss guard very carefully indeed. But over the years, Rolex have won nearly half the Chronometer Certificates which have ever been awarded, even though our painstaking production techniques allow us to produce a mere fraction of the annual output of Swiss watches.

Outside.

Protecting the Perpetual movement is the Rolex Oyster case.

It is carved out of a solid bar of gold, platinum or stainless steel, in a series of 162 separate operations.

In most watches the winder is the weakest part. In a Rolex it is an added strength. It screws down onto the case rather like a submarine hatch, and is internally sealed for extra protection.

The crystal that covers the face is another unique Rolex device. The more under-water pressure you put upon it, the tighter it fits.

Rolex make many different Oysters. A Datejust in fine surgical steel costs £206, while an 18ct. gold Datejust costs £1,590. Or possibly you might prefer the platinum and diamond Day-Date. At something over £5,000, it's a very fine watch.

But, whichever Oyster you choose, you'll know that, inside and out, it's a remarkable example of the watchmaker's craft.

Recommended retail prices include VAT.



If you would like to write to us for an Oyster catalogue, we will tell you the name and address of your nearest official Rolex jeweller.
Rolex, 1 Green Street, Mayfair, London W1Y 4JY.



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Deputy chairman for Royal Worcester

Power engineers attack TUC pay ceiling call

S.A. of Gosselies in Belgium. He succeeds Sir Joseph Hunt, who is retiring later this year as chairman of the Fairey Company. Mr. R. W. Holder has been appointed vice-president of Fairey S.A. Mr. L. G. Tylee has become directeur général of Fairey S.A. in place of Mr. Talbott.

Mr. J. A. E. Barnes has been appointed managing director of BUTTERFIELD-HARVEY in place of Mr. K. N. Oakley who has resigned. Mr. F. R. Bowcott, who

has been acting as managing director, remains with the company as deputy managing director. Mr. L. Worthington has become production director in succession to Mr. S. Mills who has retired.

after 30 years' service. Mr. D. A. Lawrence has joined the Board as financial director, and continues as secretary.

The company is a subsidiary of Bradley and Co.

Mr. Don Brady, a director of the household division of Reckitt Pty Australia, is moving to England to become marketing director of RECKITT PRODUCTS.

the household and toiletries division of Reckitt and Colman. He succeeds Mr. John Mernagh who is taking over as director of Reckitt and Colman's international development department, household and toiletries.

★
Mr. Philip Barron has been appointed financial director of TIMES NEWSPAPERS from October 1. Since 1974 Mr. Barron has been finance director for

Silicon Smelters, a company owned by Alean, British Oxygen and the Foote Mineral Company, U.S.

Mr. Barron succeeds Mr. Ian Clabb who becomes general man-

ager of Thomson Scottish
Petroleum.

*

Mr. Peter R. Grimshawe has
resigned from the Board of
PENNINE MOTOR GROUP, for

personal, business and health reasons.

*

Mr. R. G. Baker and Mr. E. C. Groom have been appointed members of WILLIAMS DE

BROE HILL CHAPLIN AND CO.,
stockbrokers.

*

Mr. D. A. Roberts has been appointed a director of FEN-
CHURCH REINSURANCE BROK-

ERS, a member of the Fenchurch Insurance Holdings group.

*

Dr. Elizabeth Laverick, deputy secretary of the Institution of Electrical Engineers has been

Mr. Gerald A. Hill has been appointed marketing director of

Mr. Ernest J. Whittle has been appointed vice president-Europe, of those products of the U.S.

ITCHIEFF

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by Chairman, Mr. S. W. Livesey

taxation for the year ended 31st March 1997. The return on capital was an excellent 28.8%. Earnings per share were 8.2p. The Directors recommend a dividend of 1.130p per share. This

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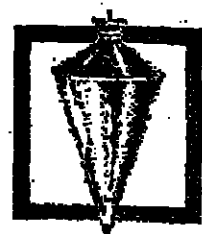
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se, London Wall, London EC2Y 5AP



Building and Civil Engineering

£10m. water supply project

TARMAC Construction has been awarded a contract worth almost £10.2m. by the Yorkshire Water Authority.

The 30-month contract—part of the Authority's project to augment the water supply to its Eastern Division—includes the construction of the headworks of the River Derwent scheme south

of Loftsome Bridge near Barmby on the March, Yorks. Main items involved are: river intake works, a raw water storage reservoir, water treatment works and pumping station sub-structure.

A 1,300m. long reinforced concrete retaining wall, 13 metres high, will form the reservoir to contain 820,000 cu. metres of water, and the treatment works will comprise seven separate reinforced concrete structures. The contract will incorporate site roads, 90,000 cu. metres of concrete, and will include the installation of 11 km. of pipes of assorted diameters up to 1.4 metres.

£6m. steel plant job

HOLST AND CO. (Northern) has formed a consortium with Clugston Construction of Scarborough to carry out a £6m. contract awarded by the British Steel Corporation.

The contract is for civil engineering work on the bloom and billet mill plant at Normanby Park steelworks, Scarborough, and involves work on the soaking pits, blooming, roughing and finishing mills and associated cooling tanks.

Work has already started on the two-year contract and it is hoped to complete a major part of it within the next 15 months. When the job is completed about 60,000 cubic metres of concrete and 4,000 tonnes of reinforcement steel will have been placed. Consulting engineers are W. S. Atkins and Partners and the quantity surveyors Gardiner and Theobald.

Projects in Kuwait

JOHN CONNELL Mott Hay has been appointed as structural consultant for three mixed developments in Kuwait with a total value of £8m. Design work is being carried out at the firm's U.K. head office in Croydon with assistance from staff based in the Gulf State.

Mainly residential tower blocks, the schemes include swimming pools, multi-unit shopping arcades and car parking facilities. John Connell Mott Hay

was appointed by Kuwait architects, Salem Al-Marzouk and Sabah Al-Hanna. An associate British firm, Mott Hay and Anderson Electrical and Mechanical Services, is designing the services for the fully air-conditioned blocks.

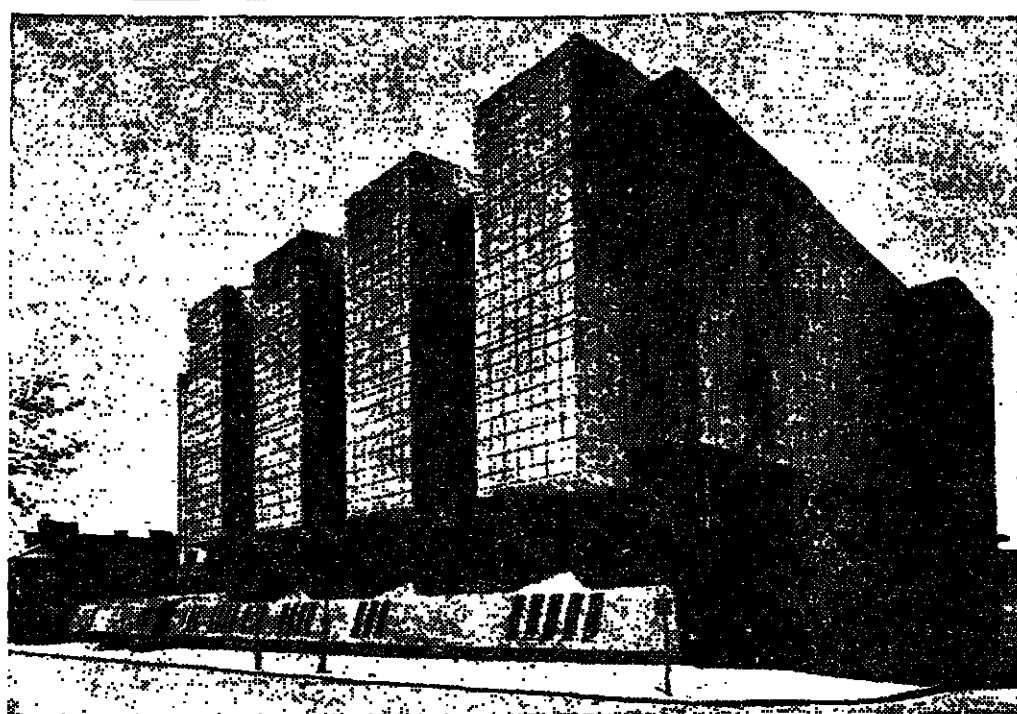
£2m. power station contract

HIGGS AND HILL Civil Engineering has been awarded a contract, valued at £2.2m. for the main construction works at the 280MW Ocker Hill generating station, Tipton, Staffs. Work involved will include the construction of four steel framed, brick clad, aluminium roofed turbine halls on concrete foundations each having three elevated air intake filter housings. Foundations will be provided for two concrete chimney windshields.

There will also be a two-storey control building, a single-storey control block, an amenities block, four transformer houses, a fuel transfer pump house, oil plant buildings, fire protection pump house and a flammable materials store.

External works include fuel oil tank foundations and bund walls, switchgear foundations, railway sidings, a fuel unloading platform, concrete oil and cable trenches, a 132kV switchgear compound, road surfacing and drainage.

Work is scheduled to commence in early July this year and to take about two years to complete.



Portland House, a four-level telecommunications switching centre in Carlisle, costing £850,000, which has been handed over to

the Post Office four months ahead of schedule by IDC, of Salford-upon-Avon. It is expected that installation of Post Office equipment will begin later this month.

HEATING AND VENTILATION Fuel saved and dampness cut

MOST OFFICE buildings and many factories and workshops are only occupied for some eight out of every twenty-four hours and not at all over the weekend. For two-thirds of its life, when a building stands empty, more heating may be wasted than in working hours.

Switch-off is dependent on the question "at what point do you switch on again to reach the desired working temperature by the time occupation re-starts?" If the system operates at a reduced level, unnecessary heating during mild weather will waste fuel.

After a cold night it may take six hours to reach working temperature levels—after a mild night, only two. And during most of the heating season, mild weather predominates.

Satchwell controls can eliminate the problem completely. The Satchwell Optimiser is an electronic device which senses the environmental conditions both inside and outside the building, and from such factors computes the optimum time at which to start the plant and switches it on.

Independent tests by the Department of the Environment made with the Optimiser have shown that 25 per cent. fuel savings are possible in a system already equipped with automatic controls. With less efficient or inadequate controls even greater savings—up to 50 per cent.—can be shown.

The Optimiser automatically relates the heating output to the programme of occupation and the prevailing conditions inside and outside the building. As little as a 2 degrees C increase in room temperature could increase fuel consumption by 20 per cent. during heating periods. Yet the difference is too small to be detected by people in the area, to any great extent. Only fully automatic control gives the necessary close regulation of room temperature. Many heating installations are inadequately controlled and cannot give the accuracy required for

maintaining working climate within such fine limits. But the potential energy savings fully justify the installation of equipment that will give the necessary fine control.

Satchwell Control Systems, PO Box 57, Farnham Road, Slough, Berkshire SL1 4UH. (0753 23961.)

Condensation Condensation results from excess moisture in stagnant air and is a major problem in many industrial and domestic buildings, frequently when walls have been insulated and double glazing applied.

Attempts to get rid of such condensation often waste energy and because of this Aidelle Products, a subsidiary of Airflow of High Wycombe, have designed Humidivent, a system which effectively prevents condensation and reduces energy loss. Humidivent has been specifically designed to deal with condensation in domestic premises, although simple modifications give it a wide potential application in factories, offices, warehouses, schools and hospitals.

Developed to meet the specifications of the Property Services Agency of the Department of the Environment, by Aidelle's technical staff in close co-operation with the senior engineer of the PSA, Humidivent consists of a small centrifugal fan mounted in the loft of a house, where a low-level thermostat

regulates air temperature and solar gain. This largely compensates for any heat loss caused by the outward flow of air, even in winter. A high-level thermostat is available to exclude very hot air.

Air from the fan is passed down the building through a central duct. There are extract fans at various key points, particularly the outer walls of the kitchen and bathroom where the highest levels of condensation are likely to occur. These fans are linked to electronic sensor devices called "Dewtrols." When moisture rises to a predetermined level the Dewtrols switch on the fans and condensation is rapidly removed.

Humidivent can be linked through a two-stage thermostat to any conventional central heating plant, so that the temperature of the air drawn in to replace extracted moisture is adjusted to the correct level. Air filtration and pressure can also be continuously maintained.

At the present stage of development, the Humidivent package consists of a centrifugal fan with dust filters; flexible ducting; flush-mountable extract fans with filters and draught flaps; "Dewtrol" control unit and sensors; Aidelle room thermostats and low and high-level loft thermostats.

Aidelle Products is at Lancaster Road, High Wycombe, Bucks. HP12 3QP. High Wycombe 26255.

Lloyd's will be the watchdog

THE INSTITUTE of Building's annual conference is to be held on November 12 at the NBS Conference Centre, London.

Speakers include Peter Trench, chairman of Y. J. Lovell (Holdings); Haydn W. Smith, chairman of the National Joint Consultative Council; R. E. Gilbert, planning and training manager, Sir Alfred McAlpine and Son (Southern); C. N. Gummitt, director of human resources, Drake and Cubitt Holdings; and A. Pullinger, chairman, Haden International Group.

It will carry out design appraisal of the primary structure and undertake shop inspection of steel reinforcement, steel sections and plate at steel mills in the U.K. and overseas. Inspections will also be carried out at the manufacturers' works of pre-stressing tendons and pre-cast concrete elements.

It is estimated that 8,500 tons of reinforcing steel, 4,000 tons of pre-stressing steel and 250,000 tons of concrete will be required during construction.

Lloyd's Register will also survey all site construction work and provide a towage certificate. Surveyors will witness the tow-out and emplacement of the structure at the Ninian Field as

a prelude to the issue of a final Certificate of Fitness.

Institute of Building conference

THE INSTITUTE of Building's annual conference is to be held on November 12 at the NBS Conference Centre, London. Speakers include Peter Trench, chairman of Y. J. Lovell (Holdings); Haydn W. Smith, chairman of the National Joint Consultative Council; R. E. Gilbert, planning and training manager, Sir Alfred McAlpine and Son (Southern); C. N. Gummitt, director of human resources, Drake and Cubitt Holdings; and A. Pullinger, chairman, Haden International Group.

Cairo roads project

A CONSORTIUM of Ward, Ashcroft and Parkman, Liverpool; Parsons Brinckerhoff Quade and Douglas Inc., New York; and Subbar Associates, Cairo, has been appointed by the Egyptian Ministry of Housing and Reconstruction, to provide consultancy services for the planning of radial highways in the greater Cairo area.

A transportation and land use study will be carried out and a 10-year development and investment programme prepared.

A contract, valued at £268,000, has been awarded to Rush and Tompkins (Civil Engineering), by Nottingham City Council. Work on the contract, for the construction of about a quarter of a mile of dual carriageway and a quarter mile of single carriageway at Queen's Drive, Nottingham, including sewers and a pedestrian subway, will start in August. Completion is due within nine months.

Petrochemical Industries Company, PIC, has awarded Coppée-Rust SA Brussels, a \$10m. contract for the expansion of an existing urea plant at Sbaia in Kuwait. It is aimed at increasing present capacity from 885 to above 1,000 tons per day.

W. H. Wood (Hastings) has been awarded a Civic Trust Award for the building of six private houses and four flats at Meriton Court, Rye, Sussex, in conjunction with Enterprise Estates (Southern). Architects are Le Fevre Wood and Royle.

£5m. road job in Somerset

MEARS HAS been awarded a £5m. contract by the Department of the Environment for the construction of a 6.4 km road to by-pass Wincanton and Holton in Somerset.

The road will be between Riding Gate, east of Wincanton, and Dancing Cross which is west of Holton on the A303.

Dual two-lane carriageways are called for and there is to be a level interchange near the Hawks Bridge to give access to

Wincanton. Also included in the contract is a 24 feet single carriageway link road which is to run between the A357 at Anchor Corner and the A371 at Holbrook.

Other work includes bridges and vehicular and pedestrian under-passes. Completion is expected in about 21 months.

Mears has also won a further contract in connection with the construction of an advanced type of sludge disposal system at the sewage treatment works in Caernarvon, North Wales.

Awarded by the Welsh National Water Development Authority, the contract is for the construction of the superstructure of a fluidised bed incineration plant. This brings the value of Mears' work at Caernarvon to over £300,000.

Additionally, the company is to provide air conditioning, heating, ventilation, electrical and fire protection services at a new computer bureau to be built for the British Steel Corporation at Rotherham, South Yorkshire.

Other contracts are for the installation of mechanical services for an office block at Crewe locomotive works for British Rail Engineering and for a 6 storey office block in Upper Thames Street, London, E.C.4, for Investment and Property Holdings.

finish, and can be sanded and polished without loss of the grain effect. Sonwood can be machined, nailed, glued and painted in the same way as timber, against which it is competitively priced. It would be used mainly in the building industry for flooring, edging, strips, door frames and shutters.

Certex is at 23, Rothchild Street, West Norwood, London, S.E.27 (01-751 1011).

Laboratory extension and housing

MIDDLESBROUGH Regional Organisation of Wimpey has won a contract worth £2.5m. for extensions at the existing laboratories of the British Steel Corporation at Grangeclown, Cleveland County.

The project comprises a major extension to the pilot plant laboratories. The scheme also incorporates a 3-storey office and laboratory block.

Included in the contract is a canteen, boilerhouse, services installation, external works and drainage together with a high element of mechanical and electrical process services.

The consulting engineers and architects for the project are Husband and Co., Sheffield. Corporation of Manchester has awarded two contracts together worth more than £1m. to the company. Both contracts are for housing in brick construction, together with external works.

Both contracts are due to start this month and to be completed by August 1976.

Verenigde NBM Bedrijven of The Hague has been appointed to handle sales and installation of the Charcon GRC sewer lining system in the Benelux countries and in the Ruhr. Glass reinforced concrete sewer linings are being manufactured for Verenigde NBM by Charcon's Dutch company, Charcon Ring-vaart of Hillegom.

TERRAPIN MOBILES

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A. Monk to construct £3m. bridge

A £750,000 contract for the construction of Kates Cabin Flyover, a four-span bridge, immediately south of the present crossing of the A1 and the A605 between the villages of Chesterton and Alwalton, in Cambridgeshire, has been awarded to A. Monk.

The flyover will have spans of 12.5, 27 and 12.5 metres respectively of in situ concrete for the side spans and standard prestressed concrete beams for the main spans. The skeleton abutments and leaf piers will be in reinforced concrete and founded on limestone at a shallow depth.

Roadworks included in Monk's 21-month contract will be on embankments up to 8.5 metres in height with 7.3 metres carriageway. Junctions will be provided at either end of the works and some reconstruction on the A1 will be necessary.

Police give Laing new charge

IN PROCESS of completing Wrexham Police Headquarters, John Laing Construction's north west region has won another contract from the North Wales Police Authority—to build a sub-divisional headquarters and traffic group garage at Mold.

Valued at £250,000, it will involve the construction of a headquarters and cell block building and a garage, workshop and car-parking complex, the installation of services, and landscaping and external works.

Work has just started on the King Street site and is due for completion in 15 months. The headquarters and cells, which will have a total area of 18,300 square feet (1,700 M²), will be generally of three stories, with a fourth storey over part of the building to house plant rooms and with a single storey cell wing.

The headquarters section of the building will include a public inquiry office, small local communications room, lounge, canteen and a rest room. It will be of reinforced concrete frame construction with pre-cast concrete floors, in-situ concrete staircases and insulated metal deck roofs. There will be facing brickwork on the external walls, brick and block internal partitions and aluminium windows.

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Hybrid of wood and plastics

CERTEX, a company in the plastics division of Glyndwed, is marketing Sonwood, a new thermoplastic material.

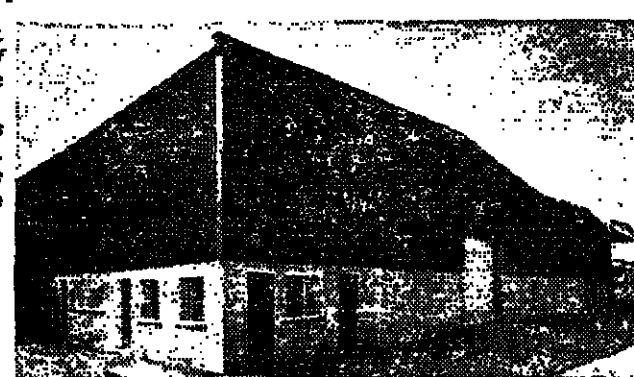
Sonwood is an intimate mixture of pvc and wood-flour which can be extruded into strips, solid profiles and heavy tubular or hollow components. Inclusion of wood greatly increases the rigidity of profiles over that of those made from pure pvc. The material is hardwearing, resists abrasion and does not swell or change shape in damp conditions. It can be produced with an integrated wood grain



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Ingersoll Rand XLEZ Water Cooled 1000 cfm Air Compressor	as above	as above
Hayes Tracemaster Model TMA/D 2 spindle Auto Die Sinker	£6,500	as above
Nu-Way HG.300 Heater	+VAT £2,750	01-253 6000
Camco Europa 31/D Folding Machine with auto feed continuous load feeders and batch control	P.O.A.	031 556 9151
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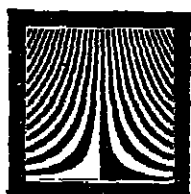
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The Technical Page

EDITED BY ARTHUR BENNETT AND TED SCHOETERS

● POLLUTION

Total destruction of sludge

DISPOSAL of sewage sludge is a growing problem since older methods of disposal such as dumping or spraying on fields are being viewed with increasing concern.

Totally destroying the sludge without harming, in any way, the environment can be done by incineration and Mesman Environmental Systems (Redman International) has introduced a unit to do this based on the fluidised-bed principle.

It totally destroys all forms of sewage sludge without the emission of smoke, dust or odours. An order has already been placed for a complete plant for Gwydded sewage division of the Welsh National Water Development Authority by Templewood Hawkeley Activated Sludge, the main contractors.

● DATA PROCESSING

Control of a power network

FERRANTI is to enhance the Eastern Electricity Board's Type 40,000 electronic alarm and control (EAC) network, which already provides remote control of some 470 primary distribution substations from hard-wired control sets in the Board's four control centres.

At each control centre, new computer equipment will take over and extend the functions of the original Type 40,000 master hardware. In particular, provision is being made for the collection of load statistics to provide information for planning and extension of the distribution network. In addition, some 37 outstations of new Ferranti Mark-2 type are included in the contract, for installation at substations not already equipped with the Type 40,000 hardware and for extending the system.

Consulting engineers for the project are J. D. and D. M. Watson and the plant, which is due to go into operation early in 1976, is being installed at the Authority's new sewage treatment works in Caernarvon.

Main components are a fluidised-bed reactor designed to operate at 800 deg. C, a temperature sufficiently high to ensure elimination of odours; a heat exchanger for cooling the exhaust gases and for preheating the combustion air; and a bag filter for final cleansing of the gases. A considerable quantity of ancillary plant and equipment is also being supplied, including full electrical services to ensure automatic operation during plant running.

Oil injectors are provided within the bed to supply extra fuel as the feed stock will not

These will work to Mark-2 master station units, which will form part of the new equipment to be supplied at the control centres. This contract brings the total value of telecontrol system orders from this Board for Ferranti including transducers, to over £1m, and extends the system to more than 500 sub-stations.

Each of the four centres will comprise a dual Argus 700 disc-based system, which will interface to master stations for the existing Type 40,000 equipment and for the new Mark-2 system. These communicate with about 130 outstations per group over a variety of communication

● FINISHING

Abrasive wheels

FLEXIBLE WHEELS for satin finishing and polishing have been introduced by A.T.A. Grinding Processes, Ebberns Road, Hemel Hempstead, Herts. (0442 64422).

normally be autothermal. The project are J. D. and D. M. rate of oil consumption is dependent on the water content of the sludge and is controlled automatically.

On leaving the reactor the products of combustion go first to the heat exchanger. The larger entrained particles, which are inert, accumulate in the specially shaped base and are extracted through a valve. The finer particulate matter is trapped by the high temperature bag filter and discharge of pollutants to the atmosphere is totally eliminated.

During normal operation, excess preheated combustion air is bypassed to the stack, virtually eliminating any visible plume. Heenan operates from Shrub Hill Road, Worcester WR4 9EQ (0905 23461).

media, including uhf radio, microwave links, rented PO lines, the Board's own pilot cables and combinations of all of these.

Data from the outstations such as alarms, change of state of circuit breakers, etc., will be processed and presented to the control engineers on display units. Control, for example, of sub-station transformer tap changers and circuit-breakers may be carried out by abbreviated plain-language instructions set in on the keyboard by the control engineer in accordance with fixed procedures.

Ferranti, Terry Road, Edinburgh, E15 2XS (031-332 2411).

Called Polinox, these composite wheels are made with alternate flaps of nylon fibre impregnated with abrasive, and abrasive cloth. Sizes range from 3 to 12-inch diameter.

The wheels can be used for polishing ferrous and non-ferrous metals, plastics, glass, wood and stone, while other applications range from blending paintwork to de-burring, says the maker.

● NAVIGATION

Vital space role for calculator

AN ELEVEN ounce, 2474 pocket calculator could determine the success or failure of the Apollo/Soyuz rendezvous in space on July 17.

The Hewlett-Packard HP-65 programmable unit will be used to calculate two critical mid-course correction manoeuvres just prior to the linkup of the Apollo and the Soyuz spacecraft. These manoeuvres will take place 12 and 24 minutes after terminal phase initiation (the beginning of the last part of the high burn manoeuvre).

Back-up will be provided for Apollo's on-board computer for the final manoeuvres prior to rendezvous and docking. The first use will be for the manoeuvre putting both spacecraft into the same orbit when the vehicles are within approximately 100 miles of each other.

The second will be for the terminal phase initiation calculations when Apollo is 22 miles from Soyuz. In both instances, the HP-65 will be used to solve the problems, and its answers will be compared with those of the on-board computer.

In the event of an on-board computer failure, however, the HP-65 will provide the only available solution for the mid-course manoeuvres, since the spacecraft will not be in communication with ground stations at that phase of the mission.

A third set of calculations to be performed by the battery-powered HP-65 will allow the astronauts to point Apollo's high gain antenna precisely at an orbiting satellite to assure proper communications with earth.

Two HP-65's will be taken on the space flight, along with four sets of program cards and six spare battery packs.

Hewlett Packard, King Street Lane, Wokingham, Wokingham, Berks. Wokingham 784774.

● INSTRUMENTS

High speed transient recorder

AT THE heart of the DL920 transient recorder offered by Datalab of 28 Wates Way, Mitcham, CR4 4HR Surrey (01-440 5321) is a 20 MHz analogue-to-digital converter able to make 20 separate measurements during each microsecond of the recorded signal.

One-shot signals are memorised in 2048 word memory and can be reproduced at will on any oscilloscope for inspection and measurement, or as hard copy on a pen recorder.

The instrument is able to record two events at the same time together with pre-trigger information so that pre-signal baseline and leading edge information can be determined.

Interfaces are available for the connection of paper tape punches, typewriters, programmable calculators, cassette recorders and computers.

DL920 will be of particular interest where sub-microsecond single pulse or low repetition rate signals occur, including power line transients, insulation breakdown, switching, shock wave, laser and ultrasonic work.

Instruments for the yachtsman

LAUNCHED BY Smiths-Industries, in a highly competitive market, is a range of electronic instruments intended for the yachtsman intent on obtaining the most from his craft. There are six instruments, costing together under £500.

The log is a chart table instrument containing both a totalising counter and a trip recorder with push-button reset. The former records from 0.01 to 9999.99 nautical miles, and the latter from 0.01 to 99.99 nautical miles.

Apparent wind direction from any point of the compass relative to the vessel's head, is displayed on a 0-360 deg. continuous movement meter sealed for cockpit mounting while a further instrument amplifies wind direction information from 50 deg. port to 50 deg. starboard, whether the wind is ahead or astern.

Another instrument indicates

the degree of acceleration or deceleration on plus or minus scales; at a steady speed the needle remains central.

A water speed indicator is calibrated from 0 to 10 knots (0 to 20 is available). The signal is generated (using revolving magnets) by a spherical inset paddle in the hull. The unit is claimed to be proof against fouling.

A wind speed indicator shows speeds from 0 to 50 knots and is stated to be sensitive and accurate at the lower end of the scale, where the information is most important.

Except for the log, all the instruments are illuminated, nitrogen filled for protection, and waterproof. All are about 4 1/2 inches in diameter and of matching appearance—a console will be available shortly.

The company, which is at 50 Orgate Lane, Cricklewood, London NW2 7JB (01-452 3333), says that marketing will be through the usual marine distributors rather than direct yacht chandlers.

Counter has new options

MODULAR design and a choice of options give the user of Hewlett-Packard's Model 5328A Universal Counter the ability to fit the counter to his unique needs.

The simplest version with no options makes frequency measurements to 100 MHz, and single-shot time interval measurements to 100 nanoseconds resolution. Time interval averaging increases resolution to 10 picoseconds for repetitive events.

It also measures period, period average and frequency ratio, and will totalise and scale inputs. Frequency measurement sensitivity is 25 millivolts rms to 40 MHz and 50 millivolts rms to 100 MHz.

Arming capability, previously available only in higher-priced instruments, gives precise control over the start of a measurement. When the counter is switched to the armed mode, an input on one channel determines when the counter starts a measurement on a second channel. Such control is essential for frequency profile measurements on swept signals.

Arming also enables time interval measurements starting on a selected pulse in a bit stream.

Hewlett-Packard, King Street Lane, Wokingham, Wokingham, RG11 5AR. Wokingham 784774.

Panel meter for most purposes

THERE APPEAR to be two opposite schools of thought in making many kinds of electronic equipment.

One says that to minimise costs and capture major market shares a manufacturer should make only a handful of standard products to which users must adapt. The other believes that where, for example, important industrial processes are at stake the customer cannot and will not adapt to standard products and will always be willing to spend more for precisely what he wants.

According to Exel Electronics, which claims a major market position in the digital panel meter business, low cost standard products have felt the effects of what it describes as "foreign dumping" in recent times, resulting from the fact that such standard products have not been meeting many users' real needs.

Exel claims that at least half of the digital panel meter market needs "tailored" units and it has just announced two designs incorporating features asked for by many customers.

Previously regarded as "special", at the heart of the more complex of the two instruments, the XL2000, is the company's "LEXE" printed circuit card which has a particularly versatile layout to enable many measurement input variations to be met.

The XL2000 has an accuracy

● HANDLING

Safer hoist design

A SAFER alternative to the friction-driven hoist is a claim made for the Con-Dec 500 platform hoist.

A geared winch gives a positive drive both up and down. Simultaneous drive engagement and brake release eliminate free fall, and the load can be "inched" into position without fall-back.

The single control lever can be fixed at any height, on either side of the mast; if it is released the brake is automatically applied. Arrestor gear comes into action if the cable should break or the platform be stopped by an obstruction in the hoist

at 20 deg. C of 0.01 per cent. of FSD at one digit, temperature coefficient of 30 ppm/deg. C, and a sampling rate of 11 or 6 per second. A 4 1/2 digit instrument, it has a Beckman display with digits 0.55 in high, but LED displays will also be available. BCD output is optional. A typical price will be in the £150 to £160 region.

The other introduction, the XL155, is for use where sampling and display-only facilities are needed. The unit is expected to be competitive with the many mass produced standard products on the market, but has some of the "tailoring" approach of the XL2000.

Exel does not intend to stand entirely still in the standard meter market and says it plans to associate with an as yet unnamed foreign company, thus hedging its bets.

It also believes the market can only expand and that the time is rapidly approaching when digital panel meters for most purposes will be on equipment manufacturers' shelves in the way that moving coil meters are to-day. Exel is at Wollerton Road, Poole, Dorset BH12 1LR (0202 291430).

way on its downward travel. There are no exposed working parts on either the brake or the winch, which has a totally enclosed oil-filled reduction box. Power is provided by diesel engine (Hatz E85FG or Petter PH1) giving a lifting capacity of 10 cwt. Free standing height is 19 feet 6 inches and the mast can be extended if supported to 151 feet. Travelling height is 7 feet 3 inches.

Manoeuvrability is by the removable double-wheel castor, enabling the unit to be turned in its own length. As there is no cantilever mast, it can be transported in any suitable vehicle without a trailer, together with extra mast sections.

It is made by Raymills (Contractors), Third Way, Exhibition Grounds, Wembley, Mids. (01-902 8971).

CONTRACTS AND TENDERS

NOTICE FOR TENDER NO. 11/1975

TYRE FACTORY, TAGURA AREA, LIBYAN ARAB REPUBLIC

1. The General National Organization for the Industrialisation invites International and first class local contractors to participate in the above tender, namely the Execution of work for a Tyre Project at Kilometer 17 Tagura Area, and which comprises the following:

a. Site Levelling works
To include excavation, filling and compaction work in accordance with the conditions indicated in the tender documents.

b. Structural and masonry works comprises the following:
I. Production hall with a total surface area of 47,712m². This includes a metal frame on a part of which the building for the mixer and the mills shall be constructed to a surface area of about 8,640m², and three storeys of concrete ceilings borne on metal structure.

II. Industrial services building on a total surface area of about 1,550m², the ceilings shall be iron truss borne on concrete frame.

III. General services building on a total surface area of 7,000m² of a concrete frame. The project shall be established on a surface area of 300,000m².

2. All works shall be according to the specifications and drawings attached to tender documents. Tender documents are obtainable from supplies department of the General National Organization for Industrialisation against payment of L.D. 500. (Five hundred Libyan Dinars). The contractor may apply for an extra copy of the documents against payment of L.D. 300. (Three hundred Libyan Dinars) both not to be reimbursed.

3. Tenders should be submitted in the name of G.N.O.I. not later than 12 noon on 13.8.75 which is the date of submitting the tenders. The opening of the tenders will take place at 10 a.m. on 14.8.75.

4. Tenders must be accompanied with a provisional guarantee deposit of L.D. 100,000. (one hundred thousand Libyan Dinars) in the form of either:
aa. Letter of guarantee issued by a first class Libyan Bank, and valid for 3 (three) months from 14.8.75.
bb. A cheque acceptable to Libyan Bank.

5. Tenders submitted after the date and time as specified, or those not accompanied by the provisional guarantee deposit, will not be considered.

6. All foreign companies are requested to accompany their offer by a letter stating their financial and commercial status authenticated by the chamber of commerce and duly legalized by the L.A.R. competent consular service. If any false information is given the Organization will cancel the offer and liquidate paid bond.

The General National Organization for Industrialisation, P.O. Box 4388, Tripoli, L.A.R. (Cable Address—TASNIALIBYA) El-Sherel/Fahmy

REPUBLIC OF BOTSWANA

CONSTRUCTION OF FRANCISTOWN TO SERULE ROAD

The Government of the Republic of Botswana will at the end of 1975 be inviting civil engineering contractors to tender for the construction of the Francistown to Serule Road. Serule is located 87 kms south of Francistown on the main railway and existing gravel road to Gaborone.

The new road will be single carriageway and will run generally parallel to the existing road and railway. The pavement will consist of a gravel sub-base, a stabilised gravel base course and surface dressing. The contract will include concrete structures crossing main water courses, including the Shabe and Tati rivers.

The construction period will be 24 months and tender documents will be in the English language.

It is the intention of the Government to limit tenders to those companies suitably qualified to carry out such work. Companies interested in prequalifying are therefore invited to complete a questionnaire within the next two months detailing their resources and experience. Copies of the questionnaire may be obtained from the Consulting Engineers at the following address:—
Sir Alexander Gibb & Partners (Africa) F. H. Kocks KG, P.O. Box 416, Gaborone, BOTSWANA

INVITATION TO TENDER

TENDER NO. 55/B/1/75 SHARJAH-RAS AL KHAIMAH (SECOND CARRIAGEWAY)

The Ministry of Public Works invites suitably experienced contractors to tender for the construction of the Sharjah-Ras Al Khaimah second carriageway.

Tender documents may be obtained from the Ministry's offices in Abu Dhabi with effect from Saturday 14.8.75 against a non-refundable fee of DH.5,000 (dirhams five thousand only).

Completed tender should be accompanied by a tender bank guarantee valid for 90 days for the sum of DH.1,000,000. The successful tenderer will be required to provide a 10 per cent. performance bond valid for the contract period.

Completed tenders should be submitted in three copies (original and two copies, duly signed and stamped by the contractors) together with all the tender documents and drawings, including the required tender bank guarantee. These should reach the Ministry within sealed envelopes displaying the subject and number of the tender on the front of the envelope, not later than 6 p.m. Sunday 3.8.75, and addressed to:

The Ministry of Planning, Permanent Projects Committee, Abu Dhabi, (Behind Al Khubarah Building No. 13).

Tenders arriving after this time and date will be rejected.

The Ministry is not bound to accept the lowest tenders.

This invitation must be read as part of the tender document.

Hamdan Bin Mohammed Al Nahyan, Minister of Public Works, United Arab Emirates.

YEMEN ARAB REPUBLIC

NOTICE OF INTERNATIONAL BIDDING SANA'A INDUSTRIAL ESTATE

Tenders are being invited for the construction of the first phase of an industrial estate in Sana'a, the capital city of Yemen Arab Republic. The estate will be constructed and subsequently managed by the recently formed Industrial Estate Development Authority. The International Bank for Reconstruction and Development (World Bank), is providing finance towards the cost of the project.

The contract will involve the development of about five hectares of the site and include the construction of an administrative building, four factory buildings of 1,200 sq. m. each with "north light" roofs, roads, an electrical distribution system, a water supply system and a sewerage system.

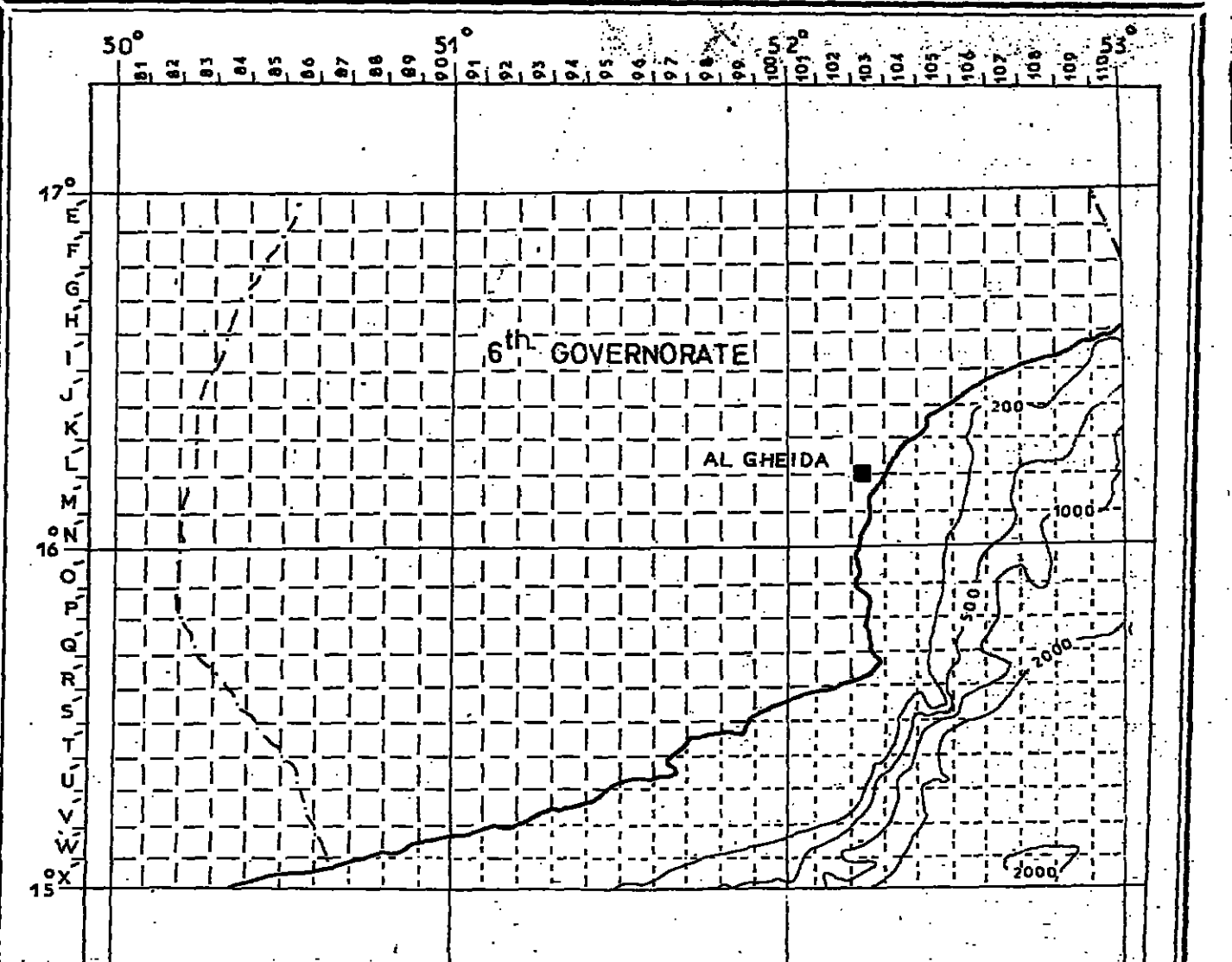
Tendering is limited to contractors who are nationals of member countries of the World Bank and Switzerland. Contractors will be required to provide information regarding their financial, technical and management resources, and this information will be taken into account when considering tenders.

The Authority will not be bound to accept the lowest tender. Documents will be issued by the Industrial Estate Development Authority on 25th July, 1975, and will be available for collection in Sana'a or London on payment of the sum of U.S. \$200 (Two Hundred) or will be dispatched by air freight on payment of an additional sum of U.S. \$25 (Twenty Five).

Tenders will be returnable personally to the offices of the Authority Midan-Al-Tahreer, Sana'a or sent by registered airmail to the Industrial Estate Development Authority, P.O. Box 533, Sana'a (Cable: Mugammat). Tel: 260 Camplan Sana'a). Tenders will be accepted until the end of office hours on Saturday, 25th October, 1975. Any tender arriving after that date will not be considered.

Interested contractors in the Middle East and Africa should contact the Authority by telex or cable. Interested contractors in Europe and the rest of the world should contact the Consulting Engineer of the Authority, Husband & Co. Consulting Engineers, St. Ermin's, Caxton Street, London SW1 0QP (Cables: Husband & Co. Tel: 919736 Husband).

General Director Dr. Ali A. Zabara



OIL EXPLORATION & EXPLOITATION INTERNATIONAL BID

PEOPLE'S DEMOCRATIC REPUBLIC OF YEMEN (P.D.R.Y.) — PETROLEUM AND MINERALS BOARD (P.M.B.) announces the offering of the above shown open areas in Al-Ghaida region of the 6th Governorate:—

1. Terms are based on 'Production Sharing'
2. Maximum area is Ten Thousand square kilometers per single contract.
3. Minimum obligation should be supported by Letter of Guaranty, but not less than seismic survey and drilling of two wells within the first 3 years.
4. Cost of Recovery out of 40% for Company. The rest 60% is split as follows: Company 12% P.M.B. 48%.
5. Realised price of excess cost recovery crude returns to P.M.B., P.M.B. has also the right to take excess cost recovery crude in kind.
6. Old data are available for investigation at P.M.B. Office—Aden.
7. Please communicate before end of August 1975 with:

CABLES: YNOC ADEN TEL: 24155
P.M.B. CHAIRMAN
TELEX NO.: 215 AD 24993



Building and Civil Engineering

£10m. water supply project

TARMAC Construction has been awarded a contract worth almost £10m. by the Yorkshire Water Authority.

The 30-month contract—part of the Authority's project to augment the water supply to its Eastern Division—entails the construction of the headworks of the River Derwent scheme south of Loftsome Bridge near Earmby on the March, Yorks.

Main items involved are: river intake works, a raw water storage reservoir, water treatment works and pumping station sub-structure.

A 1,300m. long reinforced concrete retaining wall, 15 metres high, will form the reservoir to contain 820,000 cu. metres of water, and the treatment works will comprise seven separate reinforced concrete structures.

The contract will incorporate site roads, 80,000 cu. metres of concrete, and will include the installation of 11 km of pipes of assorted diameters up to 1.4 metres.

was appointed by Kuwait architects, Salem Al-Marzouk and Sabah Al-Ramahi.

An associate British firm, Mott Hay and Anderson Electrical and Mechanical Services, is designing the services for the fully air-conditioned blocks.

The contract is for civil engineering work on the bloom and billet mill plant at Norbury Park steelworks, Scunthorpe, and involves work on the soaking pits, blooming, roughing and associated cooling tanks.

Work has already started on the two-year contract and is hoped to complete a major part of it within the next 15 months. When the job is completed about 60,000 cubic metres of concrete and 4,000 tonnes of reinforcement steel will have been placed.

Consulting engineers are W. S. Atkins and Partners and the quantity surveyors Gardiner and Theobald.

Projects in Kuwait

JOHN CONNELL Mott Hay has been appointed as structural consultant for the mixed developments in Kuwait with a total value of £5m. Design work is being carried out at the firm's U.K. head office in Croydon with assistance from staff based in the Gulf State.

Mainly residential tower blocks, the schemes include swimming pools, multi-unit shopping arcades and car parking facilities. John Connell Mott Hay

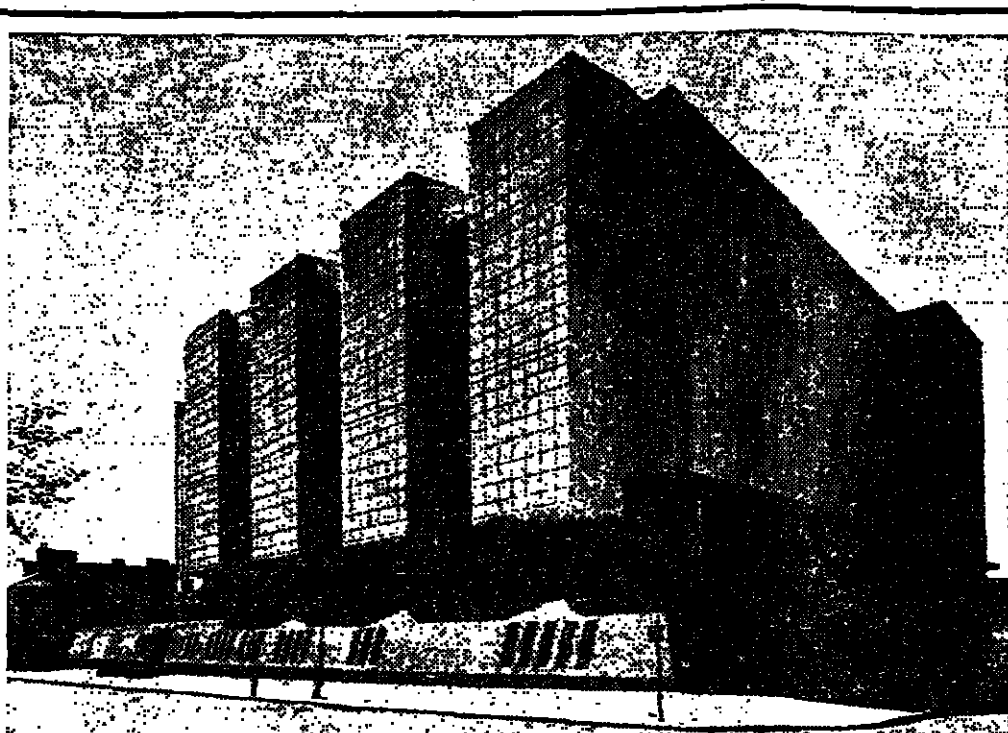
is scheduled to commence in early July this year and to take about two years to complete.

External works include fuel oil tank foundations and bund walls, switchgear foundations, railway sidings, a fuel unloading platform, concrete oil and cable trenches, a 132kV switchgear compound, road surfacing and drainage.

Work is scheduled to commence in early July this year and to take about two years to complete.

External works include fuel oil tank foundations and bund walls, switchgear foundations, railway sidings, a fuel unloading platform, concrete oil and cable trenches, a 132kV switchgear compound, road surfacing and drainage.

Work is scheduled to commence in early July this year and to take about two years to complete.



Portland House, a four-level telecommunications switching centre in Carlisle, costing £250,000, which has been handed over to

the Post Office four months ahead of schedule by IDC, of Stratford-upon-Avon. It is expected that installation of Post Office equipment will begin later this month.

HEATING AND VENTILATION Fuel saved and dampness cut

MOST OFFICE buildings and many factories and workshops are only occupied for some eight out of every twenty-four hours and not at all over the weekend.

For two-thirds of its life, when a building stands empty, more heating may be wasted than in working hours.

Switch-off is dependent on the question "at what point do you switch on again to reach the desired working temperature by the time occupation re-starts?"

If the system operates at a reduced level, unnecessary heating during mild weather will waste fuel.

After a cold night it may take six hours to reach working temperature levels—after a mild night, only two. And during most of the heating season, mild weather predominates.

Satchwell controls can eliminate the problem completely. The Satchwell Optimiser is an electronic programmer which senses the environmental conditions both inside and outside the building, and from such factors computes the optimum time at which to start the plant and switches it on.

Independent tests by the Department of the Environment made with the Optimiser have shown that 25 per cent. fuel savings are possible in a system already equipped with automatic controls. With less efficient or inadequate controls even greater savings—up to 50 per cent—can be shown.

The Optimiser automatically reduces the heating output to the programme of occupation and the prevailing conditions inside and outside the building.

As little as a 2 degrees C increase in room temperature could increase fuel consumption by 20 per cent. during heating periods. Yet the difference is too small to be detected by people in the area, to any great extent.

Only fully automatic control gives the necessary close regulation of room temperature. Many heating installations are inadequately controlled and cannot give the accuracy required for

maintaining working climate within such fine limits. But the potential energy savings fully justify the installation of equipment that will give the necessary fine control.

Satchwell Control Systems, 10 The Box St., Farnham Road, Slough, Berkshire SL1 4UL (0753 23961.)

Condensation results from excess moisture in stagnant air and is a major problem in many industrial and domestic buildings, frequently when walls have been insulated and double glazing applied.

Attempts to get rid of such condensation often waste energy and because of this Aidelle Products, a subsidiary of Airflow of High Wycombe, have designed Humidivent, a system which effectively prevents condensation and reduces energy loss.

Humidivent has been specifically designed to deal with condensation in domestic premises, although simple modifications give it a wide potential application in factories, offices, warehouses, schools and hospitals.

Developed to meet the specifications of the Property Services Agency of the Department of the Environment, by Aidelle technical staff in close co-operation with the senior engineer of the PSA, Humidivent consists of a small centrifugal fan, located in the loft of a house, where a low-level thermostat

regulates air temperature and solar gain. This largely compensates for any heat loss caused by the outward flow of air, even in winter. A high-level thermostat is available to exclude very hot air from the fan is passed down the building through a central duct. There are extract fans at various key points, particularly the outer walls of the kitchen and bathroom where the highest levels of condensation are likely to occur. These fans are linked to electronic sensor devices called "Dewtrols." When moisture rises to a predetermined level the Dewtrols switch on the fans and condensation is rapidly removed.

Humidivent can be linked, through a two-stage thermostat, to any conventional central heating plant, so that the temperature of the air drawn in to replace extracted moisture is adjusted to the correct level. Air filtration and pressure can also be continuously maintained.

At the present stage of development, the Humidivent package consists of a centrifugal fan with dust filters; flexible ducting; flush-mountable extract fans with filters and draught flaps; "Dewtrol" control unit and sensors; Aidelle room thermostats and low and high level loft thermostats.

Aidelle Products is at Lancaster Road, High Wycombe, Bucks. HP12 3QP. High Wycombe 35252.

prelude to the issue of a final Certificate of Fitness.

£5m. road job in Somerset

MEARS HAS been awarded a £5m. contract by the Department of the Environment for the construction of a 6.4 km road to bypass Wincanton and Holton in Somerset.

The road will be between Ridsdale Gully, east of Wincanton, and Dancin Cross which is west of Holton on the A302.

Dual two-lane carriageways are called for and there is to be a two-level interchange near Hawkers Bridge to give access to

Wincanton. Also included in the contract is a 24 feet single carriageway link road which is to run between the A357 at Ancho Corner and the A371 at Holbrook.

Other work includes bridges and vehicular and pedestrian under-passes. Completion is expected in about 21 months.

Mears has also won a further contract in connection with the construction of an advanced type of sludge disposal system at the sewage treatment works in Caernarvon, North Wales.

Awarded by the Welsh National Water Development Authority, the contract is for the construction of the superstructure of a fluidised bed incineration plant. This brings the value of Mears' work at Caernarvon to over £200,000.

heating and plumbing services at the Northampton bus station development for Northampton Borough Council.

This project will comprise a concourse below ground level, a bus terminus taking up the whole of the site area, a single level car park and three floors of offices above.

Additionally, the company is to provide air conditioning, heating, ventilation, electrical and fire protection services at a new computer bureau to be built for the British Steel Corporation at Rotherham, South Yorkshire.

Other contracts are for the installation of mechanical services for an office block at Crevin, Inverclyde, for British Rail Engineering and for a 8 storey office block in Upper Thames Street, London, E.C.4, for Investment and Property Holdings.

Another contract is for the installation of air conditioning,

finish, and can be sanded and polished without loss of the grain effect.

Sonwood can be machined, nailed, studded and painted in the same way as timber, against which it is competitively priced.

It would be used mainly in the building industry for flooring, edging strips, door frames and shutters.

Cerex is at 23, Rothschild Street, West Norwood, London, S.E.27 (01-751 1011).

Laboratory extension and housing

£3m. jobs for Matthew Hall

MATTHEW Hall Mechanical Services has been awarded contracts totalling £3m.

The largest at £1.9m, is for the design and construction, in conjunction with the Property Services Agency Mechanical and Electrical Engineers, of air conditioning, heating and electrical services for the new Inland Revenue Accounts offices to be constructed at Cumbernauld, Dunbartonshire, for the Directorate of Scottish Services.

Another contract is for the installation of air conditioning,

heating and plumbing services at the Northampton bus station development for Northampton Borough Council.

This project will comprise a concourse below ground level, a bus terminus taking up the whole of the site area, a single level car park and three floors of offices above.

Additionally, the company is to provide air conditioning, heating, ventilation, electrical and fire protection services at a new computer bureau to be built for the British Steel Corporation at Rotherham, South Yorkshire.

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Cerex is at 23, Rothschild Street, West Norwood, London, S.E.27 (01-751 1011).

Laboratory extension and housing

MIDDLESBROUGH Regional Organisation of Wimpey has won a contract worth £2.5m. for extensions at the existing laboratories of the British Steel Corporation at Grange Road, Cleveland County.

The project comprises a major extension to the pilot plant laboratories. The scheme also incorporates a 3-storey office and laboratory block.

Included in the contract is a canteen, boilerhouse, services installation, external works and drainage together with a high element of mechanical and electrical process services.

The consulting engineers and architects for the project are Husband and Co., Sheffield.

TERRAPIN MOBILES

FROM STOCK

Ring Tony Little at 0110 250 7487 or 0110 250 7487 or 0110 250 7487 or 0110 250 7487

A. Monk to construct £3m. bridge

A £750,000 contract for the construction of Kates Cabin Flyover, a four-span bridge, immediately south of the present crossing of the A1 and the A605 between the villages of Chatterton and Alwalton, in Cambridgeshire, has been awarded to A. Monk.

The flyover will have spans of 12.5, 27, and 12.5 metres respectively of in situ concrete for the side spans and standard prestressed concrete beams for the main spans. The skeleton abutments and leaf piers will be in reinforced concrete and founded on limestone at a shallow depth.

Roadworks included in Monk's 21-month contract will be on embankments up to 5.5 metres in height with 7.3 metres carriageway. Junctions will be provided at either end of the works and some reconstruction on the A1 will be necessary.

Police give Laing new charge

IN PROCESS of completing Wrexham Police Headquarters, John Laing Construction's north west region has won another contract from the North Wales Police Authority—to build a sub-divisional headquarters and traffic group garage at Mold.

Valued at £850,000, it will involve the construction of a headquarters and cell block building and a garage, workshop and car-parking complex, the installation of services, and landscaping and external works.

Work has just started on the King Street site and is due for completion in 18 months.

The headquarters and cells, which will have a total area of 18,300 square feet (1,700 M²), will be generally of three storeys, with a fourth storey over part of the building to house plant rooms and with a single storey cell wing.

The headquarters section of the building will include a public inquiry office, small local communications room, lounge, canteen and a rest room. It will be of reinforced concrete frame construction with pre-cast concrete floors, in-situ concrete staircases and insulated metal deck roofs. There will be facing brickwork on the external walls, brick and block internal partitions and aluminium windows.

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Tel: Torquay (0803) 22799.

PLANT & MACHINERY SALES

Description	Price	Telephone
Bigwood 16" x 0.049". Cut to length and Forming Line.	P.O.A.	0742-26311 Ext. 255
B & W Y.1000—Water Cooled 1000 cfm Air Compressor	£6,250 +VAT	as above
Ingersoll Rand XL22 Water Cooled 1000 cfm Air Compressor	P.O.A.	as above
Hayes Tracemaster Model TMA/D. 2 spindle Auto Die Sinker	£6,500 +VAT	as above
Nu-Way HG.300 Heater	£2,750 +VAT	01-253 6000
Canco Europa 31/D Folding Machine with auto feeders and batch counter	P.O.A.	031 556 9151
1973 Newall SA Cylindrical Grinders—High Speed 12" x 36" Angle Head, Plunge up to 10" wide with copy	From £15,000	Tel. 02092-4357
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Lloyd's will be the watchdog

LOYD'S REGISTER is to certify the reinforced concrete Central Platform being built by Howard Doris at Loch Kishora for the Ninian Group. The platform is intended for installation in the Ninian Field in 1976.

It will carry out design appraisal of the primary structure and undertake shop inspection of steel reinforcement, steel sections and plate at steel mills in the U.K. and overseas. Inspections will also be carried out at the manufacturers' works of pre-stressing tendons and pre-cast concrete elements.

It is estimated that 8,500 tons of reinforcing steel, 4,000 tons of pre-stressing steel and 250,000 tons of concrete will be required during construction.

Lloyd's Register will also survey all site construction work and provide a towage certificate. Surveyors will witness the tow-out and emplacement of the structure at the Ninian Field as

a prelude to the issue of a final Certificate of Fitness.

Institute of Building conference

THE INSTITUTE of Building's annual conference is to be held on November 12 at the NFBTE Conference Centre, London.

Speakers include Peter Trench, chairman of Y. J. Lovell (Holdings); Haydn Smith, chairman of the National Joint Consultative Council; R. E. Calvert, planning and training manager, Sir Alfred McAlpine and Son (Southern); C. N. Grummitt, director of human resources, Drake and Cubitt Holdings; and A. Pullinger, chairman, Haden International Group.

Hybrid of wood and plastics

CERTEX, a company in the plastics division of Glyndwed, is marketing Sonwood, a new thermoplastic material.

Sonwood is an intimate mixture of pvc and wood-flour which can be extruded into strips, solid profiles and heavy tubular or hollow components. Inclusion of wood greatly increases the rigidity of profiles over that of those made from pure pvc.

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Cairo roads project

A CONSORTIUM of Ward, Ashcroft and Parkman, Liverpool, Parsons Brinckerhoff Quade and Douglas Inc., New York, and Sabbour Associates, Cairo has been appointed by the Egyptian Ministry of Housing and Reconstruction to provide consultancy services for the planning of radial highways in the greater Cairo area.

A transportation and land use study will be carried out and a 10-year development and investment programme prepared.

A contract, valued at £285,000, has been awarded to Rush and Tompkins (Civil Engineering), by Nottingham City Council. Work on the contract, for the construction of about a quarter of a mile of dual carriageway and a quarter mile of single carriageway at Queen's Drive, Nottingham, including sewers and a pedestrian subway, will start in August. Completion is due within nine months.

Petrochemical Industries Company, P.I.C. has awarded Coppe Rust S.A. Brussels, a \$10m. contract for the expansion of an existing urea plant at Shuaiba in Kuwait. It is aimed at increasing present capacity from 585 to above 1,000 tons per day.

W. H. Wood (Hastings) has been awarded a Civic Trust Award for the building of six private houses and four flats at Merryton Court, Rye, Sussex, in conjunction with Enterprise Estates (Southern). Architects are Le Fevre Wood and Royle.



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FINANCIAL TIMES SURVEY

Monday July 14 1975

BIRMINGHAM

Birmingham has a notable record of urban renewal and modernisation. Now, industrial recession and the freeze on local government spending has brought the whole programme to a virtual halt. As with most of the world's great industrial cities, this is a time of waiting until the economy resumes its momentum.

A city still in good heart

By Roy Hodson

(Regions Editor)

OF ALL the great British cities Birmingham is the most modern in terms of construction effort and the best equipped in terms of new facilities including an almost complete urban motorway system. The old slums have been almost eradicated and replaced by a number of new housing developments around the outskirts. The inner city areas have had care and attention lavished upon them during the past few years as part of a concerted programme to complete the refurbishing of the city. Meanwhile as befits a city founded upon the trader and small manufacturer, Birmingham has given great attention to its position as a focal point of industry and has made many investments designed to consolidate or

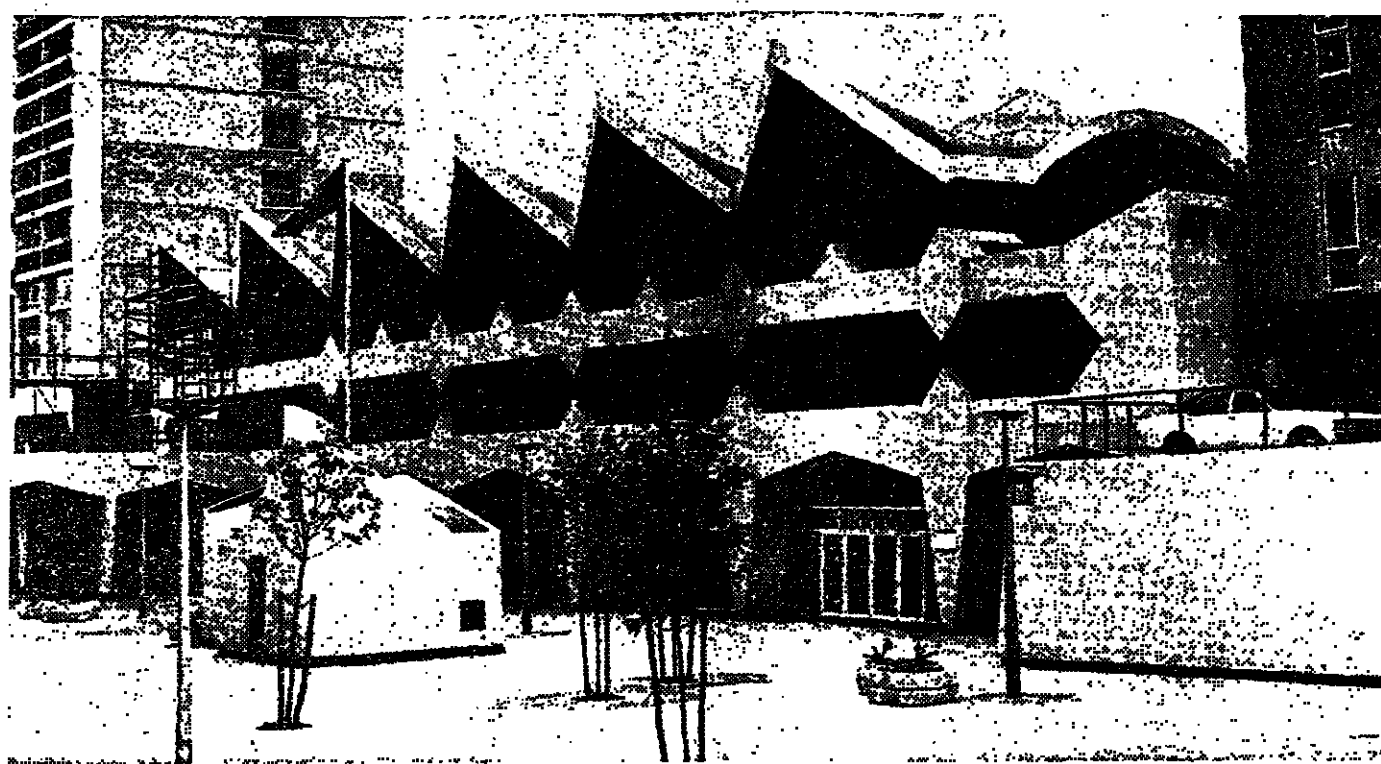
strengthen its position as a forceful component in the economic life of the nation.

The spending freeze imposed by the Government has temporarily brought all this forward-looking activity to a sudden, skidding halt. Indeed, so violent has been the deceleration that the city's social services, economic expansion plans, commercial development schemes, and housing aspirations, are all bound to suffer; some of them quite badly.

The Birmingham Chamber of Commerce reports that the construction industry in this part of the Midlands, already hit by the recession in private sector building, is likely to be in dire straits as a result of the drying up of public sector money. The city of Birmingham makes no secret of the fact that there will be no new capital projects. The unease is compounded by the fact that the Midlands car industry is itself in deep trouble — British Leyland and Chrysler being the dominant units in the district — thus removing the traditional underpinning of industrial security which has served Birmingham so well in the past during periods when other parts of the country were having problems.

Holding up

It would be unwise, however, to dwell too long on Birmingham's immediate problems. They are there and they are serious. But the other side of the picture is that unemployment in the area is still slightly below the national average and that the small businesses which make



The ATV centre in Birmingham.

up the lion's share of private sector industrial activity are still holding up remarkably well against the chill economic winds that blow. Francis Amos, the chief executive of Birmingham City (which is now a metropolitan district in the West Midlands County) described the city's financial and economic difficulties to me at some length but concluded, "I feel that in Birmingham we may more than hold our own in a recession

against other parts of Britain." And that seems to sum it up. The city has a tremendously tough and resilient commercial and industrial base. Although it may be currently under some strain it is far from giving way. Added to that the people of Birmingham are not themselves given to reacting excitably when times become difficult. Outsiders sometimes accuse them of being rather phlegmatic in their attitude. That may be no

bad thing when the going gets tough. It was demonstrated from that it really is business as usual in the city.

A similar attitude seems to be prevailing on the industrial scene as question marks loom over the motor industry, the motor cycle industry, and the construction industry. Some industrialists and trade unionists are already prepared to argue that it will be a good thing in the long run if

Birmingham can be not too violently wooed away from its heavy dependence upon motors and the metal cutting trades.

Much has been done already by the city's policy over recent years of encouraging the development of offices. The enlarged commercial life of Birmingham is now firmly established and its role as a financial centre second only to London is assured.

Next year promises to be a landmark in Birmingham's progress as a city. The Queen is expected to open the National Exhibition Centre which Birmingham has backed financially from the start. The sceptics prophesied that the centre would never happen, and that no such project could be contemplated outside the London area. Birmingham has every intention of proving them finally and completely wrong. The centre is well booked and it is thought only a matter of time before the Motor Show decides to settle in there. Meanwhile, the boost to the economy of the area is incalculable. New hotels have sprung up in Birmingham and surrounding areas to cater for the many thousands of foreign businessmen who are expected to make Birmingham and the Exhibition Centre a regular part of their itinerary during visits to Britain in future years. The 1m. square feet of exhibition halls with associated leisure and eating facilities and services requirements is a whole new industry in itself which will employ directly and indirectly as many people as a major car-making operation. The centre, now virtually complete, will not

be trapped at the 11th hour by a financial squeeze. The government have given a pledge on that taking the view that it is a national tool for industry and commerce.

The exhibition halls will be linked to the M1 by a motorway now under construction. Birmingham is now firmly established and its role as a financial centre second only to London is assured. The terminal gress as a city. The Queen is expected to open the National Exhibition Centre which Birmingham has backed financially from the start. The sceptics prophesied that the centre would never happen, and that no such project could be contemplated outside the London area. Birmingham has every intention of proving them finally and completely wrong. The centre is well booked and it is thought only a matter of time before the Motor Show decides to settle in there. Meanwhile, the boost to the economy of the area is incalculable. New hotels have sprung up in Birmingham and surrounding areas to cater for the many thousands of foreign businessmen who are expected to make Birmingham and the Exhibition Centre a regular part of their itinerary during visits to Britain in future years. The 1m. square feet of exhibition halls with associated leisure and eating facilities and services requirements is a whole new industry in itself which will employ directly and indirectly as many people as a major car-making operation. The centre, now virtually complete, will not

Working well

There were fears that the ambitious city motorway rings and links would turn Birmingham into an amateur motor race track with little of the old city left for the walker. That was perhaps a reasonable fear given the Midlander's love and devotion to his motor-car. In contrast the new city system appears to be working very well indeed. New hotels have sprung up in Birmingham and surrounding areas to cater for the many thousands of foreign businessmen who are expected to make Birmingham and the Exhibition Centre a regular part of their itinerary during visits to Britain in future years. The 1m. square feet of exhibition halls with associated leisure and eating facilities and services requirements is a whole new industry in itself which will employ directly and indirectly as many people as a major car-making operation. The centre, now virtually complete, will not

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The motor industry

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THE PROPOSAL to set up a regional offshoot of the National Economic Development Council to give the Midlands and the industrial heartland around Birmingham more autonomy in shaping its future signals just how profoundly disillusioned — and worried some sections of the population are. Needless to say it does not come from those charged with carrying out Government policy, but from those on the receiving end, and has also attracted some sympathy from employer-members of the West Midlands Economic Planning Council.

The basic argument has by now become well-worn — that Birmingham and the surrounding industrial enclave has become over-dependent on the motor industry and that national plans for the development of less-well-off regions, to which the Birmingham area has made a solid contribution, have left it stranded. The tide of technological advance in electronics, computerisation, and petro-chemicals that has been flowing so strongly towards the development areas has also flowed around the Midlands, leaving it an island dependent largely on vehicle and associated production. Those who are demanding a bigger local say in the future of the Birmingham area are not surprisingly to be found among union leaders, whose primary concern is to preserve jobs at a time when employers are trying to shed them at what seems to be the fastest post-war rate.

While the two objectives are opposed, many more employers see eye-to-eye with union leaders in this matter, and are just as disillusioned and worried about the under-utilisation of resources. The Birmingham Chamber of Industry, for instance, has been a consistently strong critic of the Government's industrial development certificate policy,

which in the past has prevented even successful companies from modestly extending their premises.

The motor car is for Birmingham more than just a way of life. One in four in the Greater Birmingham employment area, which includes the new town of Chelmsley Wood, the ancient royal borough of Sutton Coldfield and fast-growing Solihull, obtains his livelihood from it. In addition, most of the 260,000 or so in the metal-using industries make some components for the vehicle industry despite the diversification that has gone on. Indeed, it is quite possible that much of this diversification has been matched by new employment making replacement components, which has become very big and, like exhaust systems and brake parts, often specialised business.

Mention of how the motor industry has lost out in its home

market is tantamount to prying into public grief. All the major manufacturers have suffered from a combination of declining demand and production lost by industrial disputes. But if we probe further into causes of the correlation between its present plight and Government policies seems undeniable. The motor industry has been used by successive Governments as a convenient instrument of "stop-go" policies, with a score or more of alterations to purchase tax and hire purchase arrangements during formative years when other producing nations like Italy, Japan, Germany and France were forging ahead.

In the mid-sixties U.K. output was on a par, or greater than, its chief rivals. Holding it down to around that level deprived it of the chance to earn sufficient to parallel their investment. Now the government has had to come to the rescue of British Leyland in order to preserve jobs and the country's biggest net exporter.

British Leyland has some of

its biggest units in the Birmingham area — Austin-Morris at Longbridge alone employs 24,000, Rover a total of 8,000, and British Leyland all told a total of 35,000. While Lucas has 12,000, GKN, Wilmot and other principal suppliers many thousands more.

Concerns

Counting in smaller concerns, more than 80,000 are dependent on the motor industry. The motor manufacturers have little scope for product diversification but suppliers can and have successfully applied their special technologies to other industries, like aerospace, chemical plant and, above all, to exporting. Component suppliers, indeed, contribute about 40 per cent. of the total value of the motor industry's exports, and many of the leaders in the Birmingham area like Lucas and GKN are also European leaders.

A wide spread of markets has significantly helped to reduce the impact of the downturn in

the fortunes of the motor industry, though no one can hope to escape the consequences of strikes and other industrial action, which in May was largely responsible for pulling down total output to half what it was in May, 1974, when industry was still recovering from the 3-day week.

This heavy commitment to the motor car, and the high ratio of manufacturing to service industries, are two of the principal reasons why Birmingham unemployment grows more rapidly than the national average in a recession. Equally, however, the recovery is faster — or rather it has been in the past. Whether the motor industry will again demonstrate its volatile temperament when the upsurge comes along remains to be seen. One has a nasty feeling that the high penetration of imports is here to stay unless the industry can become more price and quality competitive.

The car dominates life in Birmingham much more than in terms of employment. In creat-

ing an almost brand-new city from a complexity of villages during a period when car ownership and road haulage was growing exceptionally fast the civic authorities had a tremendous problem in keeping the traffic moving. That they managed to do this so successfully deserves more recognition than is usually given.

Of course, as in most other cities, a lorry breakdown or accident can quickly cause congestion, but in general traffic now flows round the city centre — which is increasingly becoming a pedestrian precinct — with very few hold-ups, thanks to the provision of dual carriageway inner and middle-ring roads with heavily restricted opportunities for cutting across traffic in right turns. Where it has not been found possible or necessary to provide brand new roads, others, like the Hagley Road to the west have been widened and those adjacent, like the Harborne, Calthorpe and Westbourne roads made one-way to improve circulation.

Nevertheless, despite this dedication to the car, and the comparatively lavish provision of multi-storey car parks dotted round the city centre, there are signs that the new authorities created by local government re-organisation may be less responsive in the future to what car owners regard as their inalienable right to a patch of the Queen's highway. Even limited parking on some roads looks like being stopped and commuters will find it increasingly expensive, perhaps exorbitantly so, to use their cars for this purpose only.

If this seems somewhat harsh on owner-drivers, it can be seen as part of the growing dichotomy, of the inevitable battle between the car as a source of revenue and as a kind of mobile castle and all that entails psychologically. Most people will hope, no doubt, that a decision will be indefinitely postponed on a subject which locally is so closely bound up with jobs in the U.K.'s biggest net earner of foreign currency.

Peter Cartwright

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The economic crisis has left local Government in Birmingham in something of a state of shock. Spending has had to be cut back and many new schemes have been stopped.

Local government

NEW YORK is not the only city with a cash crisis. Birmingham's city fathers and administrators are in something of a state of shock at the sudden reversal in their fortunes. The spending has had to stop. "No new public works are going to start," says Francis Amos, the chief executive of this new metropolitan district of 1,100,000 people, quite flatly.

The public purse cannot, however, be snapped shut overnight without causing a great deal of bewilderment and not a little hardship. It is the temporary abandonment of a dream for Birmingham. For many years the city has been busy with the most grandiose highways construction and improvement programme undertaken by any British city. It is largely complete but important gaps remain. The city was pursuing it with vigour, believing that this was the right way to improve Birmingham's potential as an industrial and commercial centre. Now roads are scratched off the shopping list. The so-nearly-complete motorway city where urban motorways encircle the city centre (which is rapidly becoming pedestrianised) may not be finished in the lifetime of many citizens.

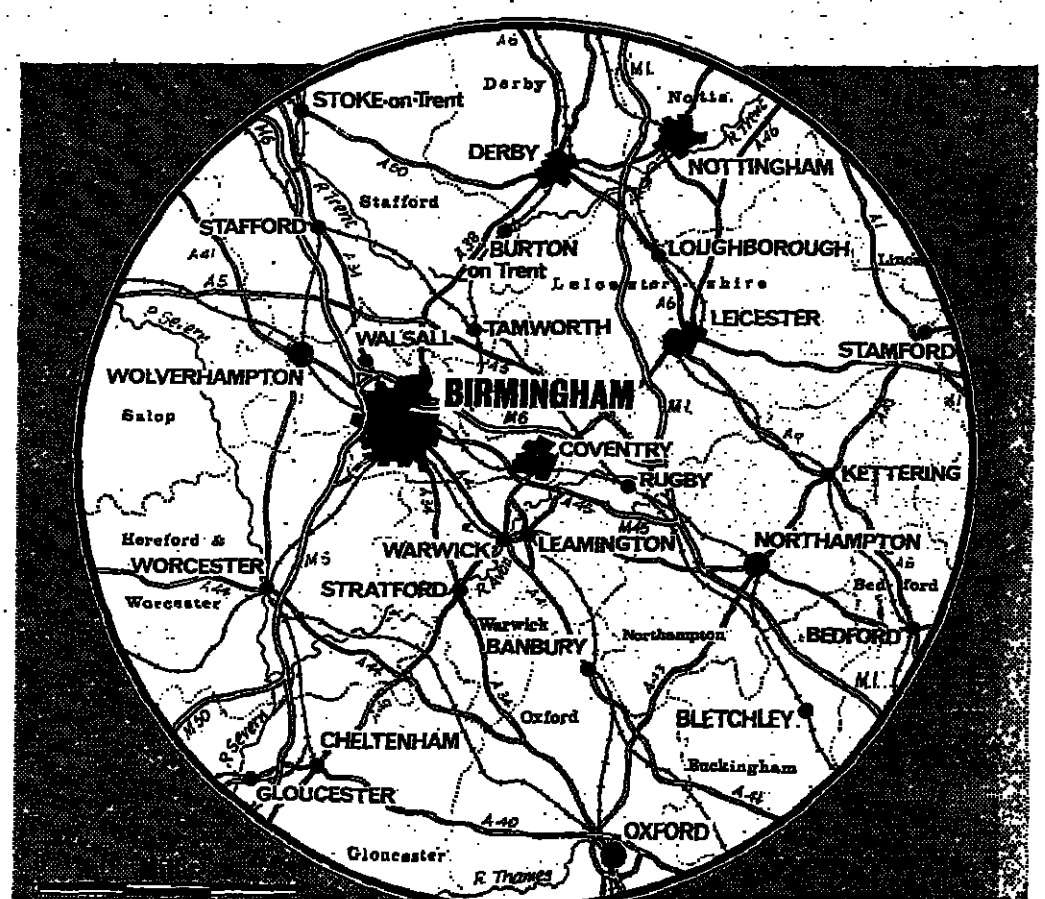
Housing

It looks as if new housing areas lacking proper road connections will have to stay in that condition for some time to come. "The sort of roads programme we have been pursuing for Birmingham will not be seen again as far ahead as we can see," said one official. That is a confident forecast. Not only has the money dried up. The West Midlands Metropolitan County who are now the authority responsible for major highways have indicated in their transport policies and programmes submission for 1975 that the emphasis in future investment will be on public transport rather than private.

an annual budget of nearly £200m. on its revenue account and £75m. on the capital account. It is committed to a massive programme of urban renewal which entails the improvement and repair of some 75,000 dwellings over the next ten years. Drastic cuts in roads spending will certainly interact with that programme. It will be difficult to persuade private house-owners to co-operate by matching spending for house improvements to bring properties up to acceptable standards while the authority is unable to improve the areas in general.

In another direction the Birmingham authority has sponsored the building of the National Exhibition Centre which is now almost ready. The offices and build a new office project will be completed in city at Edgbaston with the object of making Birmingham the biggest commercial centre outside London. The triple blow towards enhancing and expanding its commercial reputation for a very long time.

CONTINUED ON NEXT PAGE



During the last ten years Birmingham has become a major financial centre. At present, as in other cities, there is little interest in new investment and the financial fraternity is having to cope with the problems of high inflation.

The financial scene

"IT'S JOLLY hard to lend money at the moment. Demand for borrowing is low, with companies showing little interest in launching out on capital investment." This is the theme repeatedly heard just now among bankers in Birmingham, whose extensive community is grappling with an economic recession for the first time since it grew to its present size in the early 1970s.

Over the past decade a long procession of merchant and other banks have moved into the area to create one of Britain's largest financial centres outside London. Generally, those running the "second city's" money industry are confronting the problems of a stagnant economy with hope for the longer-term prospect, some reserve about the short-term outlook and with a judicious streamlining of organisations as necessary.

Mr. Robert Burns, who heads Hill Samuel's Birmingham operation, set up in 1969 but lately moved to larger premises, with a banking hall in New Street, offers a view typical of several local bankers.

"Traditional merchant banking activity, particularly lending, is very quiet," he says. "There is no general demand for money at the present time. Industry generally is frightened to exit of investment and no one is knocking on the door to fit their company either."

However, the full banking service now offered, tending to be for rather larger accounts, has stimulated new interest. Had it not been for the banking hall, we should have been quite depressed," adds Mr. Burns. A sign of the less booming times is that the previous minimum limit of some £100,000 on overdrafts lending has been brought right down to £1,000.

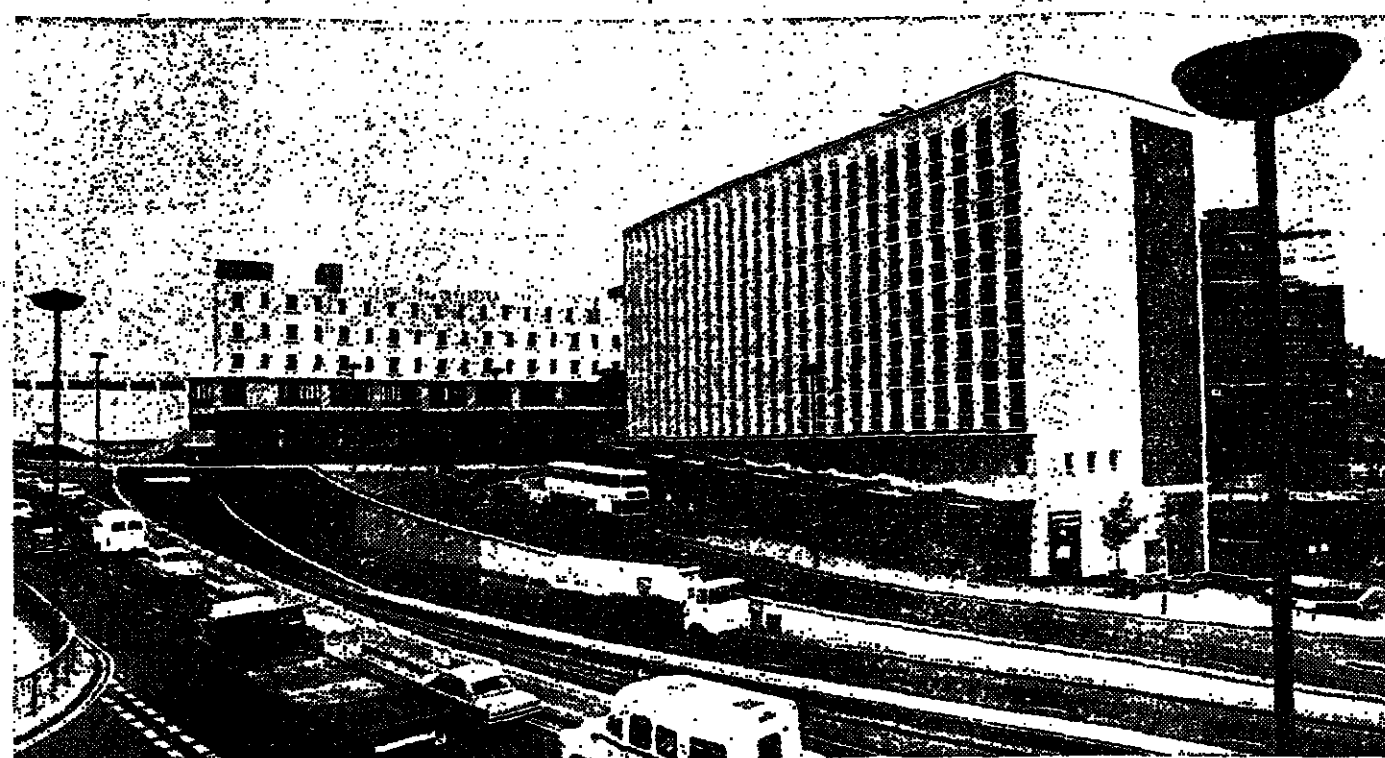
Names

Hill Samuel is one of some half-dozen merchant banking names from the City of London's elite group of accepting houses to have established a presence in Birmingham, to tap the potential of the West Midlands industrial conurbation. One recently added to the list is Kleinwort Benson, whose year-old office is run by Mr. Peter Lawrence.

Other names include Brandts, Charterhouse, Japhet, and Samuel Montagu, the latter of which now has one representative, Mr. John Clissold, now looking after its offices both in Leicester and Birmingham.

Another accepting house long established in Birmingham, is Singer and Friedlander, where the director, Sir Timothy Harford, says they have remained gratifyingly active for the current subdued climate, helped by a fair amount of small merger business.

Sir Timothy, who does not expect the market in new flotations—in which S. and F. was previously so active—to revive for a couple of years, is keen on an alternative method of bringing outside capital into private companies. This would be by private unquoted plac-



A new underpass in Queensway.

ings of 10-15 per cent. of a company's shares with institutions, an idea in which he has found quite a lot of interest, provided a well-run business was in question.

Among other merchant banks represented in Birmingham are Industrial and Commercial Finance Corporation, a long-established provider of finance for small concerns, Gresham Trust, specialising in venture capital, and Slater Walker.

A sign of the community feelings among merchant bankers in Birmingham is to be found in the recent institution of regular luncheon meetings at which views on topics of mutual interest are exchanged.

Birmingham's financial industry has a long history, in that two of the main clearing banks, Lloyds and the Midland, had their origins there, a fact which has given both a notably strong hold in the Midlands. Of the other clearers, Barclays, with a large local Board, is fairly buoyant at the short-term end of export financing," says Mr. Cunliffe, who has noted a considerable tendency for British companies to seek protection against depreciation of the pound by invoicing exports in the buyer's currency.

Bankers Trust International is another representative of the

concentrated in the North West, has also shown special interest in Birmingham in recent years.

Outside the ranks of the clearers, Standard and Chartered Banking Group, in Birmingham for three years, has, with its international network, found a good role for its services in assisting industry's growing volume of sales abroad. "We are export-orientated and a major part of our business is concerned with finance of export trade," says Mr. George Morgan, who runs the office.

Slack

A Birmingham banker in a major United States group who is finding export business a compensation for slack conditions on the domestic front is Mr. John Cunliffe, British manager of the Bank of America's operations there. "Loan demand at the moment is pretty low, but business is fairly buoyant at the short-term end of export financing," says Mr. Cunliffe, who has noted a considerable tendency for British companies to seek protection against depreciation of the pound by invoicing exports in the buyer's currency.

Bankers Trust International is another representative of the

American banking fraternity in Birmingham, where it has been established for two years, with Mr. Harold Cotterill in charge. Various aspects of Euro-currency financing are an important part of its business, as well as sterling lending, in larger amounts. Like other bankers, Mr. Cotterill notes that demand for sterling loans has not been very brisk lately.

One merchant banking name no longer seen in Birmingham is Old Broad Street Securities, whose title was changed to UDT Banking and whose activities, previously strong in property lending, have been cut right back by its parent, United Dominions Trust, in the difficult financial climate. UDT, now concentrating on consumer finance and reducing its property portfolio as quickly and economically as possible, is running its Midlands interests through a regional controller.

Among locally based banks, a familiar name is G. R. Dawes, formerly Neville Industrial Trust, once a very active force in the new issue market. In the difficult atmosphere of the last 18 months, Dawes has followed a policy of high liquidity and restrictive lending, which has stood it in good stead. The quotation of Dawes'

owned by the Midland Bank. Forward Trust has found its clearing bank parentage a particular blessing in the past two years, when the secondary banking crisis has affected competitors. With its heavy emphasis on industrial and commercial lending, it is, like banks in the region, at present experiencing a considerable reticence on the part of industry to borrow for the finance of new productive equipment.

Heartening

Perhaps the section of the Birmingham financial fraternity which has found events this year the most heartening is the Stock Exchange, where business has undoubtedly expanded markedly with the strong recovery in share prices.

Although the structure of the local stock market—now part of the Midlands and Western unit of the United Stock Exchange—has not essentially altered this year, there was certainly considerable shedding of staff in last year's severe market slump. With somewhat slimmed-down operations, the market, consisting of 14 broking and three jobbing firms, has been well placed to benefit from the much revived activity this year.

One prominent broker offers the view that there is unlikely to be a firm in Birmingham not making money at the moment, though this was probably not the position last year.

For the longer-term, however, some anxiety is being expressed that further progress of inflation at anything like recent rates could spell renewed problems and perhaps force mergers to maintain the local market industry in a thoroughly viable form.

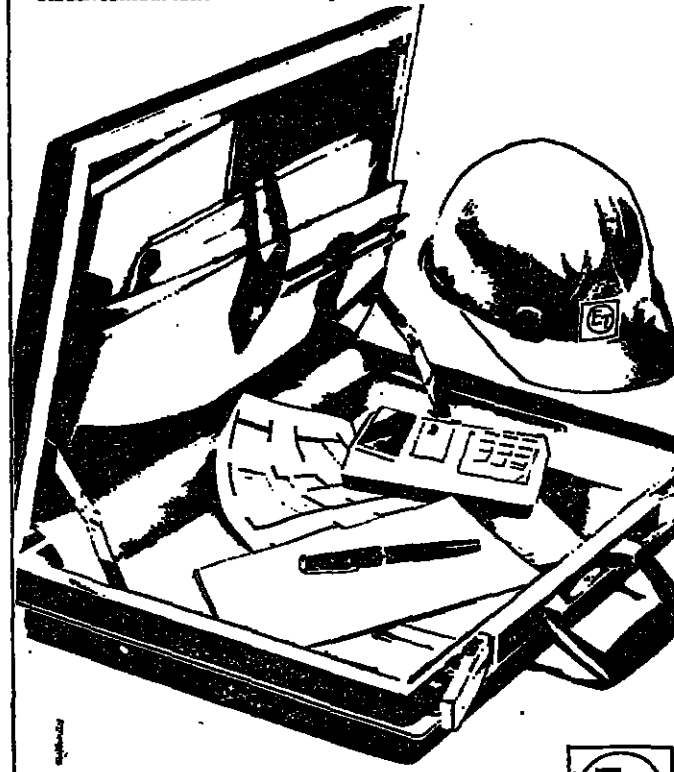
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Local government

CONTINUED FROM PREVIOUS PAGE

dren in the city and a growth in the number of retired people. The resources of the social services, other departments of the council, and the voluntary organisations are now

recognised by the city as inadequate to deal with the city's new pattern of population. Social services amount to 20 per cent. of the city's budget.

There is a shortage of social workers and the city places much reliance upon the work of the voluntary organisations. But the city can only afford to subsidise some £300,000 a year in grant and to about 100 such bodies. They could easily spend two or three times that sum to cope with the social work that needs to be done in Birmingham.

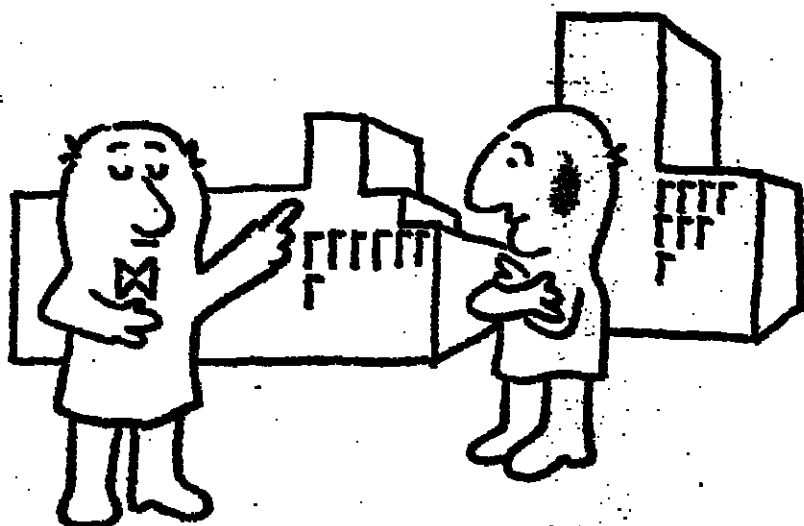
In January the management team made up of the city's chief officers produced its first report since the reorganisation of local government. It listed the policy options open to the city during this year as 1) to give the highest priority to housing; 2) to spread growth in expenditure evenly across all the city's programmes; 3) to concentrate resources on the needs of the disadvantaged; or 4) to give greatest emphasis to those policies directed towards developing Birmingham as a major European city.

Opponents

Within those options there would have been much room for the political opponents in the city and the metropolitan county to fight for their policies and principles. But now that the spending has had to stop even those options have been removed. Birmingham will have to get along the best way it can without any future expansion or development until the cash begins to flow again. Meanwhile the best that can be done is to finish, slowly and economically, those capital projects which are too far advanced to be abandoned (thus saving the local construction industry from total disaster) and plan very hard to stretch inadequate funds a long way to cope with the city's social problems.

Roy Hodson

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BIRMINGHAM V

After several golden years commercial property development, like most other business activities in Birmingham, has throttled back. There is also a large footage of untenanted existing accommodation overhanging the market

Office properties

THE LAST three years have seen an unprecedented boom in office building in Birmingham, which seemed an ideal centre for such development because of its place at the heart of the country's industry, at the heart of the national motorway network, and as a rapidly expanding regional centre for commercial interests. But o-day Birmingham has getting on for 2m. square feet of empty office space, either completed or in the pipeline. A further 1m. square feet of office development has been given planning permission but nobody in Birmingham at the moment would be foolish enough to predict when any of that is likely to go ahead.

The majority of the prestige new developments have taken place in the city centre, around Clomere Row, New Street Station and Paradise Circus, for instance, and also out along the Hagley Road into the desirable residential area of Edgbaston. Large new office developments along the Hagley Road, such as Metropolitan House and Duxess Place are to be joined soon by Tricorn House, a string Y-shaped building offering 150,000 square feet on four floors. Tricorn House has been developed by the Law Lan Company and is being marketed in Birmingham by Davy Bridge Sellers, who are trying for rentals of around £2.75 to £3.00 per square foot.

Projects

Other new projects about to come on to the market are Centr City, a development by the London Life Association Limited in partnership with the Equitable Life Assurance Society. Clarendon House, phase three of a Norwich Union development just off the Hagley Road, and Elgar House, a development by City of London Securities Limited, fronting on part of the Queensway. Birmingham's inner-ring road. Centr City will be finished in November and will offer 10,000 square feet of air-conditioned offices within a few minutes of New Street Station. Birmingham agents are Alexander Stevens and Company, joint agents with Jones Lang Wootton of London. Rentals are not being quoted at present. Clarendon House is being handled by Edwards Bigwood and Bewley, of Birmingham, and will be finished this autumn, completing the whole Clarendon and Corbett House triangle. These offices are not air-conditioned and rentals of around £2.25 a square foot are being asked. Elgar House has just been completed and offers a total of 34,700 square feet of offices, available in units from 1,500 square feet upwards. These offices are not air-conditioned and the Birmingham agents, Grimley and Son, are seeking rentals of about £2.25 a square foot.

Some office space has been empty for some time in the city centre. Perhaps the most notable example is Alpha Tower, which stands at Paradise Circus, next to the Holiday Inn. This development is 27 floors high and has been on the market for the last three years or so. Six floors remain unlet and rentals of between £2.30 and £2.50 per square foot are being quoted.

Birmingham agents for Alpha Tower are Alexander Stevens and Company, who are also handling an unusual office restoration project, Regency House, on the Hagley Road. Here half a dozen Regency houses have had their facades retained while behind everything is new and air-conditioned. There is 25,000 square feet on offer in total at rents from £2.75 to £3.25 a square foot, depending on the area taken.

Another building which has become a notable addition to Birmingham's skyline is Metropolitan House, standing at Five Ways at the beginning of the Hagley Road. This is a development by MEPC, who are also developing further offices, a restaurant, bar and shop project across the road from Metropolitan House with the intention of providing office space but nearly 20,000

square feet of air-conditioned offices are still available at a rental of about £3.50 a square foot. Birmingham agents are Edwards Bigwood and Bewley, joint agents with Leighton Goldhill and Partners of London.

Void rating

While no-one imagines that developers or agents in Birmingham want to see office space standing empty, certain projects may come in for void rating on empty premises after a certain period. The situation is causing concern in Birmingham, as elsewhere, and this situation is likely to discourage further any prospective developers. At present the market is certainly a tenant's one and there is room for negotiation on rentals.

Tamebridge House, for instance, is a new office development by DWP Group Limited out at Perry Barr in Birmingham. Birmingham agents Neale and Aldridge say they are prepared to let the 35,000 square feet of air-conditioned offices as a whole for around £1.75 a square foot. The accommodation is complete and ready to move into and it has fairly easy access to the Midlands link motorway system.

Rentals in Birmingham compare very well with those of other regional cities such as Manchester, Leeds and Sheffield. As can be seen new air-conditioned offices can be had from £2.25 a square foot upwards and few developers are expecting a return of more than £3.00 a square foot in the city centre. One exception is Equity and Law House developed recently in Great Charles Street, Birmingham, next to the Birmingham Stock Exchange by the Equity and Law Life Assurance Society. Equity and Law have themselves taken some office space but nearly 20,000

square feet of air-conditioned offices are still available at a rental of about £3.50 a square foot. Birmingham agents are Edwards Bigwood and Bewley, joint agents with Leighton Goldhill and Partners of London.

While the office accommodation in Birmingham was expanding, it was paralleled by a spate of hotel building and extension of existing hotels both in the city centre and again along the Hagley Road. In the last three years Birmingham's hotel bedrooms have almost trebled in number, largely because of the National Exhibition Centre.

The expansion in Birmingham's hotel accommodation has included in the last few years the building of the Strathallan Hotel on the Hagley Road, the re-opening of the Grand Hotel in Birmingham's city centre, the extension of the Albany Hotel close to New Street Station. Birmingham now has half a dozen first-class hotels in the city centre and along the Hagley Road, one of the most lively being the Holiday Inn, situated at Paradise Circus, with its own swimming pool.

Two new hotel projects are ahead at present are both being built at the National Exhibition Centre itself by the AVE Industries hotel group. The largest and most luxurious of the two is the Birmingham Metropole, sited by a 16-acre man-made lake and offering 500 individually air-conditioned rooms. Next to it is a smaller hotel, the Warwick, which is less expensive, with 200 single bedrooms each with private bathroom, and which will offer comfortable accommodation at a moderate price.

While the hotel accommodation in and around Birmingham is previously going to be needed from 1976 when the NEC opens its doors to thousands of visitors, it looks as though it may be some time before the office market in the city picks up again.

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Eileen Totten

Despite one or two shows of strident militancy the labour battalions in the Midlands have behaved remarkably well considering the inflationary pressures at work.

The signals are encouraging

The labour front

THIS HAS BEEN a fairly tranquil year so far in Birmingham on the labour front. The toll of strikes and the number of really serious ones are both down on 1973, a better year for comparison than 1974, which included the three-day week. And in spite of the encouragement inflation gives to pitch pay claims high, the great majority of settlements have fallen within 10-15 per cent. of new money—that is, after excluding consolidation of threshold pay and so on.

It could be argued that circumstances were against prolonged militancy, that the recession in the motor industry had predictably restraining effect, that it did not prevent car workers' colleagues in nearby Coventry from cruelly trying to bring their financial distress to the attention of the public. Perhaps then it was due to a higher degree of maturity that exists in Birmingham, a greater sense of responsibility in not taking strikes to the limit of what a strike might achieve. Or it could have been good fortune at the timing of pay contracts, many of which ran out at a time when the Ryder Report on British Leyland and the subsequent restructuring threw a blanket of gloom over the city.

There was probably another, more potent factor at work in helping to create calmer waters—no effects of the introduction of a system of measured day work in place of piecework. This has measurably reduced a major source of strife on the shop floor and its acceptance is something of a triumph of persistence in the face of widespread hostility. However, while flat rate pay systems have removed a lot of the daily conflict that arises with a multiplicity of piecework rates, trouble, when it does occur, can be over what is regarded as a major issue of principle, like a demand by a section of workers to have their skills more adequately recognised by being placed in a higher grade.

Some disputes certainly seem to take on an added bitterness, one such, and one of the few really damaging strikes in Birmingham, was that in February by toolmakers at British Ley-

land's body pressing plant at Castle Bromwich. This was over regarding and it went on for so long that it cost a big contract worth £2m. for jigs, tools and other equipment for the South Korean motor industry being established by Mr. George Turnbull, British Leyland's former managing director—and the loss of 100 toolmakers' jobs. It was strikes like this that dissolved the residue of goodwill built up during the three-day week period last year, and were as disheartening as the spirit of collaboration of those days had been encouraging.

Incidents

Even though the number of strikes initiated in Birmingham has been fewer, lay-offs caused by other stoppages outside the city contributed to the feeling that the motor industry had reverted to form. Motor car manufacturers and component suppliers, though employing only a third of the working population generate two-thirds to three-quarters of the reported industrial incidents.

The rest of industry tends to get tarred with this brush, whereas the truth is that industrial harmony prevails at the majority of establishments. One reason is that more than half the working population is employed at factories whose labour forces are under 50, where no bosses are known and a family atmosphere is encouraged.

The lower incidence of disputes is not unexpected when short time and redundancies are growing quicker than for many years. It was not surprising, either, to find the British Leyland joint shop stewards committee, which claims to represent about 135,000 shop floor workers at BL factories in England, Wales and Scotland, warning management of its total opposition to enforced redundancy and calling for the full-scale nationalisation of the ailing motor giant.

The committee is a Left-wing splinter group of leading shop stewards, most of the executive members of which come from really damaging strikes in Birmingham, was that in February by toolmakers at British Ley-

land's body pressing plant at Castle Bromwich. This was over regarding and it went on for so long that it cost a big contract worth £2m. for jigs, tools and other equipment for the South Korean motor industry being established by Mr. George Turnbull, British Leyland's former managing director—and the loss of 100 toolmakers' jobs. It was strikes like this that dissolved the residue of goodwill built up during the three-day week period last year, and were as disheartening as the spirit of collaboration of those days had been encouraging.

Among the more significant of its activities has been to broaden the base of its operations by taking the initiative in forming a joint shop stewards organisation for the whole of the industry, including suppliers. It has also taken further steps to establish an active movement to match on the shop floor the Corporation's multinational business. A few weeks ago, for instance, it entertained some delegates from the Insom plant in Italy, and will be doing a return visit.

On the purely domestic front the BL stewards can be expected to bring considerable influence to bear in moulding the future pattern of management-worker relationship, but which the Corporation's own consultative document states: "The general climate of opinion requires that business problems be considered, examined and discussed jointly as well as unilaterally." Not surprisingly, the stewards do not see workers' representatives in a passive role, and are out to change "discredited" to "decided" jointly.

Biggest

While the BL stewards organisation is an unofficial body and sometimes appears to be little more than a platform for Leftist views, it is the biggest shop floor movement in a generally and beyond in a more classic, militant and vital industry. Whether it will count equally in a practical sense in the industry time alone will tell. Much of the bedrock work is done well away from the glare of publicity by experienced, practical men whose work ranges over many industries, like the West Midlands Engineering Employers Association and the regional Advisory Conciliation and Arbitration Service.

Birmingham, and the Midlands are extremely well served by such organisations, perhaps par-

ticularly in the educational and advisory aspects. The EEA courses at various levels—at which union officials are regular lecturers—and the advisory work of the ACAS in helping to design pay structures are in their different ways as solidly valuable in promoting understanding as any other activity.

The growing complexity of the industry, the changing and ever lengthening regulations and the quickening pace of innovations from the Community across the Channel are making increasingly exacting demands on union officials and employers. These are not least concerned with worker participation. As the chairman of a group employing several thousand people put it shortly after the ending of the three-day week: "Just how do you retain the enthusiasm and collaboration without disclosing too much to the way-out Left?"

One experiment currently attracting a lot of national and international attention is the Meriden Motor Cycle Co-operative. This was set up last February with a Government loan of nearly £1m after workers had fought for 18 months to keep it open. It would have been closed in the autumn of 1973 by Norton Villiers Triumph—itsself set up with nearly £5m. of Government aid as part of the programme to revitalise the motor cycle industry. One of the issues that had to be settled before the Co-operative could set off the ground was the opposition of NVT workers at the Small Heath, Birmingham, factory who believed that Meriden represented a threat to their jobs. (NVT has sold for a long time and a three factory operation—two NVT factories and Meriden—would require a massive further investment by the Government.)

At the time of writing a Government decision on the future of the industry is awaited. What seems clear is that enthusiasm for co-operatives has been waning and that less extreme solutions to worker participation are likely. What they will eventually be seems certain to be heavily influenced by attitudes in the motor industry.

Peter Cartwright

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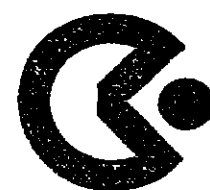
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BIRMINGHAM VI

Sometimes criticised, and severely, for its worship of the motor car, Birmingham has nevertheless made more efforts than most cities to cope with the traffic problem. The result, for the most part, is an efficient road network.

Good communications



The motorway complex at "Spaghetti Junction."

A GLANCE to right or left at the acres of new off-white asbestos roofing as one passes over the motorway intersection at Gravelly Hill, on the northern outskirts of Birmingham, offers convincing evidence of the attractions of the city as a communications centre. At this, and at other major intersections on the M5, M6 and the link to the M1 to the east new warehouses and industrial estates are springing up with almost undiminished speed and vigour, in spite of what may be happening elsewhere to the building and construction industry.

The motorways have not only brought new life and livelihoods to the Birmingham area; they have been an essential component in helping to expand planning and community horizons and in establishing a larger dimension in its industrial and commercial life-style. The distribution and service industries have always been relatively weakly represented, and in spite of the upsurge in new warehouse and similar construction—still are.

Compared with the South-East, for instance, the ratio of employment between the manufacturing and service industries is almost exactly reversed, with the majority of employment here in manufacturing industry and in the South East in service and distribution. Nevertheless, the impetus provided by the new road communications is beginning to redress the imbalance and to point the way to future growth which one would expect over the years to reduce the discrepancy still further.

The motorway network has also helped appreciably in bringing nearer customers for the voluminous shopping basket of industrial goods Birmingham produces.

However, while the motorways provide an infinitely better means of transporting goods than alternative A roads, the network has its deficiencies and costly omissions.

As the centre of an area increasingly conscious of its export potential—latterly, indeed, that exports offer a more profitable and less price-restrictive way of life—it has become increasingly critical of deficiencies and of the postponing of road construction that could help to reduce the price per kilo of many products. The more that is experienced and learnt about the continental transport systems the more vocal becomes the criticism.

Birmingham Chamber of Industry drew attention to some of this criticism in commenting on the Government's second consultation document on the many Birmingham-made goods

to their destinations they are seen to be less than adequate in many directions. Even to get those wanting to visit it from other parts of the country, while for those coming from Birmingham the Coventry Road or A45, is being widened and made dual carriage-way for a growing length.

The addition of a third lane is made difficult, and on some sections is ruled out, by the many bridges. The best that is immediately on offer to help relieve the congestion and frustration is an extra lane for the five mile stretch between Quinton and Lydiate Ash, hotels locally, New Street between two junctions. This Station on which operations are should be completed in about a year's time. There are further proposals to build "climbing lanes" for slow-moving traffic at certain stretches.

The construction of the National Exhibition Centre adjacent to the airport just over the city boundary is being matched with the construction of a 14-mile section of the M42, with which it will be linked by a new dual carriageway.

Thus while road communications in the immediate vicinity of the city are almost unexcelled, and have been matched by city ringway distribution systems that are now nearing completion, when one follows the consultation document on the many Birmingham-made goods

Absurd

"The absurd position we have drifted into is illustrated by the situation where on the one hand we have a major container port and exit for exports like Southampton with no motorway link, while Avonmouth, whose trade is virtually limited to imports, has the M5 passing beside it," says the Chamber. As important is the lack of a motorway to the East Coast ports facing Europe like Harwich and Felixstowe, through which goes a growing volume of Birmingham products.

Meanwhile, Birmingham Rep has lost its artistic director, Michael Simpson and in the interim this autumn's season of plays has been planned by the resident manager, John Greenwood, and shows a marked turn away from new plays and back to the traditional.

Disband

Finance has, of course, caused as many problems on the theatrical boards of the area as elsewhere and has resulted in a number of potentially exciting companies having to close down temporarily or to disband altogether. Among those to go under—temporarily, only for the time being—was the Second City Theatre Company formed by John Blackmore, former artistic director at the Midlands Arts Centre in Birmingham, which is itself subject to continuing financial problems. Second City toured youth clubs, community centres and playgroups and included in

its repertoire another David Edgar play, "Fired," the story of a youngster who, in his first job after leaving school, sets fire to the factory in which he works. The play was described by one regional drama critic as the most exciting new work to be seen for many a year.

Inevitably, all forms of art, and particularly those which are professionally based, such as theatre companies and orchestras, continue to face problems of finance and are having to cut back in some form or another, in production costs and sizes of companies, for example.

Musically, Birmingham and the region as a whole has a strong tradition which is led by the City of Birmingham Symphony Orchestra, with an established and world-wide reputation and is backed by a large number of both professional and amateur groups. Here, perhaps, the programme contents tend to reflect the innate conservatism of Midland music audiences.

In the graphic arts, too, the city is well represented by professional and amateur artists, sculptors, designers and photographers though there is still a shortage of good modern gal-

cards which can be brought designated stations and Pub Transport Executive office have had an encouraging response.

Plans for the future Birmingham's airport have been much debated and have been hanging fire for long enough. Now they are becoming clearer, though their shape has not yet been decided. The decision to abandon Maplin caused a reappraisal of the regional scene, and it seems likely that Elmdon will take its place with Manchester and perhaps one other airport in the country's major airports. Passenger handling facilities have been progressively improved and occasional expanded, and while they are still being deluged at peak periods especially if this coincides with diversions from Heathrow the are designed to match the annual flow.

Symbol

The most recent expenditure of £250,000 has also enabled the authority to provide a duty-free shop, a status symbol and practical project—its operators and users alike have felt has been too long absent. This is the first phase of a plan for an anticipated future throughput of 15m-40 passengers in the 1980s.

Like most regional airports Elmdon relies heavily on charter flights. These have been chiefly responsible for lifting the passenger traffic from around 850,000 at the start of the decade to nearly 1.3m by 1973.

Last year there was a fall back to 1.1m, but so far this year the recovery has been quite sharp, with business rising 21 per cent above the comparable period last year, and the hope that 1973 figures will again be reached. From next year onwards the airport will begin to benefit from visitors to the National Exhibition Centre which in time are expected to add perhaps 300,000 to existing custom. If next year the traffic continues to expand, with the NEC traffic coming against the existing 1.8m, the airport could be knocking against the existing 1.8m, the

Contracts

All the same BR has some substantial contracts, as with the oil companies and with the major car and component companies. Austin Morris at Longbridge, for instance, brings in a substantial amount of materials and sends out about a third of finished car production by rail. But the biggest increment in traffic is expected to come from the passenger side. Certainly the recently introduced rail-road travel

This prospect adds urgency to the plans for resting the terminal buildings at the other end of the site, near the main railway—which would enable the airport to be integrated with rail and road access to the NEC. Much of the programme of the money—will be devoted to new and improved runways and peripheral services. It is likely to be carried out in phases, and the next is expected to be announced soon.

Peter Cartwright

For all its heavy industrial image Birmingham lies within easy reach of some of Britain's most lovely countryside. Inside the city, too, much is being done to create the facilities for a civilised leisure environment.

The leisure scene

BECAUSE of its image as an intensely industrialised city, Birmingham has for many years had to struggle against an unjustified reputation as a place to which people go only for business reasons and in which there is little chance to relax. In fact the city and the area around it is rich in the number of artistic and leisurely diversions which it can offer and it deserves to be better known for its attractions and distractions.

In recent years, the arts in the West Midlands have taken on a new sense of adventure and experimentation and the approaching opening of the National Exhibition Centre has given a needed boost to the "leisure industry," with new Fair Jerusalem by David Edgar, the Rep's resident dramatist who is with the company on a rate which would, perhaps, horrify the long-dead Quakers whose influence once ruled Birmingham, and gave it the reputation of a conservative city which closed down its shutters at 9.30 p.m.

The new sense of adventure is exemplified best by the experimental work which is being carried on, with considerable artistic success, in studio theatres in and around Birmingham—though audiences are sometimes disappointingly small

—and by a number of "community arts" projects which have grown up. Though most of the studio theatres in and around Birmingham have existed for several years, it is only fairly recently that they have begun to experiment seriously in terms of breaking new ground with imaginative, modern and sometimes "way-out" productions of established classics and with audience-participation presentations.

At Birmingham Rep's "Brim Studio" and in the main auditorium itself there have been a number of successful and exciting productions of an experimental nature, which have included the world premier of "O Fair Jerusalem" by David Edgar, the Rep's resident dramatist who is with the company on a rate which would, perhaps, horrify the long-dead Quakers whose influence once ruled Birmingham, and gave it the reputation of a conservative city which closed down its shutters at 9.30 p.m.

controversially on neo-Fascism and political intrigue. So far it has been indefinitely shelved by the Reps and negotiations are going ahead to find another theatre to stage the play.

Meanwhile, Birmingham Rep has lost its artistic director, Michael Simpson and in the interim this autumn's season of plays has been planned by the resident manager, John Greenwood, and shows a marked turn away from new plays and back to the traditional.

Finance has, of course, caused as many problems on the theatrical boards of the area as elsewhere and has resulted in a number of potentially exciting companies having to close down temporarily or to disband altogether. Among those to go under—temporarily, only for the time being—was the Second City Theatre Company formed by John Blackmore, former artistic director at the Midlands Arts Centre in Birmingham, which is itself subject to continuing financial problems. Second City toured youth clubs, community centres and playgroups and included in

its repertoire another David Edgar play, "Fired," the story of a youngster who, in his first job after leaving school, sets fire to the factory in which he works. The play was described by one regional drama critic as the most exciting new work to be seen for many a year.

Inevitably, all forms of art, and particularly those which are professionally based, such as theatre companies and orchestras, continue to face problems of finance and are having to cut back in some form or another, in production costs and sizes of companies, for example.

Musically, Birmingham and the region as a whole has a strong tradition which is led by the City of Birmingham Symphony Orchestra, with an established and world-wide reputation and is backed by a large number of both professional and amateur groups. Here, perhaps, the programme contents tend to reflect the innate conservatism of Midland music audiences.

In the graphic arts, too, the city is well represented by professional and amateur artists, sculptors, designers and photographers though there is still a shortage of good modern gal-

CONTINUED ON NEXT PAGE

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BIRMINGHAM VII

Birmingham's city centre redevelopment and housing policy have come under heavy criticism in recent years, and although a cohesive pattern has begun to emerge in the centre, it has become apparent that the housing problem is not likely to be easily solved.

Redevelopment

FOR THE LAST 15 years Birmingham has suffered the labour pains of redeveloping its city centre on a massive scale, but at last its citizens and those who visit it can see a more comprehensive picture emerging. To-day, Birmingham is a city with modern shopping and an up-to-date traffic system and most of the debris involved in the re-building is being gradually cleared away.

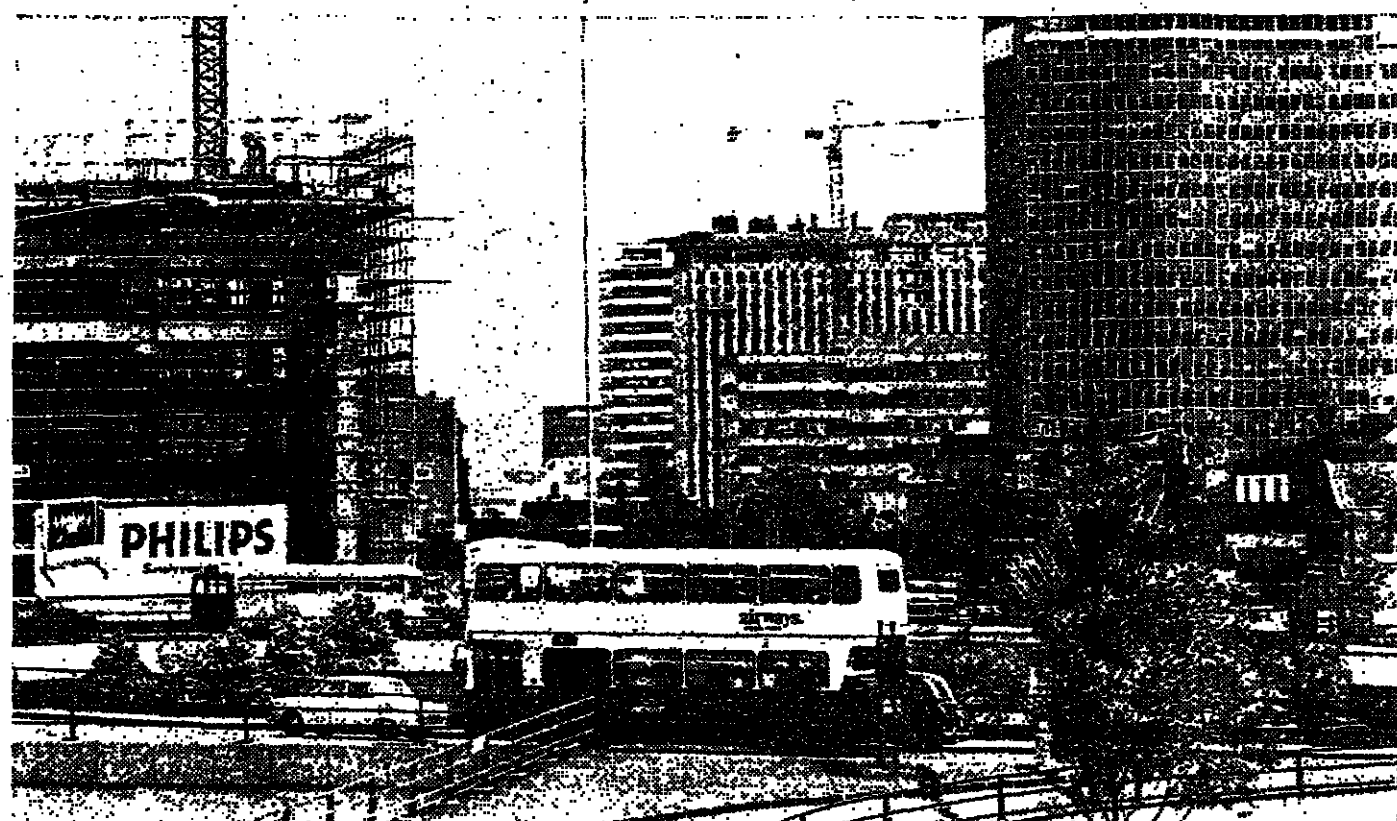
What has emerged out of the commercial entrepreneurial drive of the last 15 years is controversial, but at least some continuity both of roads and public buildings has been achieved in the city centre, especially around the Paradise Circus and Victoria Square areas. Birmingham over the last year has become a more attractive city to shop, walk and work in and the city council is keen to press ahead with this advantage.

"Now is an opportune time for the city council to do its policy making without being under such direct pressure as in recent years," says Graham Shaylor, City Planning Officer. "We are trying to review the city centre and its role, identify those functions which should be there and also examine those uses which might not have a city function any more. We are also keen to see how the city centre can contribute to maintaining and improving the employment situation."

Jobs

Birmingham has been losing 10,000 manufacturing jobs a year over the past two years and the city is now keen to see it build up its service sector to put it on a par with other cities such as Manchester and Sheffield. Graham Shaylor sees no problems in developing more service type jobs in the centre in terms of land and premises. Birmingham, both with its Bull Ring development completed about ten years ago and its more recent New Street Shopping Centre, still has spare capacity for turnover in the retail field. But what is concerning the city council at the present particularly is the movement of commuter traffic in and out of the city.

Birmingham's inner-ring road, a £51m. project in all, is practically complete with the city just waiting for the last £730,000 to finish off the section at Paradise Circus on the site of the recently demolished Central Library. This inner-ring road not only carries traffic into Birmingham but also links through to the national motor-



New building at Fireways.

way system at Spaghetti Junction a few miles away. Birmingham's solution to the problem of the motor-car has been in some people's opinion to allow it to ride roughshod, on the whole, over the pedestrian. There are those who think the inner-ring road has been too tightly drawn, providing an iron collar round the city centre. In the long term the middle ring road, when completed, is more likely to carry the bulk of through traffic.

In the past year or two, however, the city council has been keen to look at the fate of the pedestrian in the city. Several main shopping areas have been made pedestrian areas and others are being considered. Bus-only routes have been introduced and the city centre bus service has caught on so well, at a standard 2p fare, that it has had to be extended. Bus fares into Birmingham and around the city have also been frozen for the last couple of years in an attempt to encourage more people to use public transport.

The council is now working urgently with the Passenger Transport Authority to improve the bus services in the inner and middle ring areas. The Passenger Transport Executive is also putting a lot of money into upgrading the railway lines

crossing the city centre between Redditch and Lichfield, and Solihull and Wolverhampton.

While the city has no plans for any revolutionary solution to the problems of cars in the city, it is possible that legislation could be introduced at some time to control the number of private parking spaces. Birmingham Council has also become increasingly aware of the need for conservation of some of the city's better Victorian buildings which give it character. Urged on by the Victorian Society in Birmingham, the city is conserving two main areas—the Victorian office area around Colmore Row, and St. Paul's Square in the Jewellery quarter. The Victorian Society, however, lost its fight to retain the old library, a listed building, which has now been demolished.

Skyline

The Birmingham skyline has changed drastically over the past five years with a plethora of new high-rise office buildings and hotels. There are some major new civic buildings, however, which have won design acclaim in the city centre. They include the £1m. new Repertory Theatre and the £3m. new Birmingham Central Library, almost adjacent to each other

at Paradise Circus. While Birmingham has had much to redevelop in the city centre it also faced post-war a massive housing problem. By 1973 60,000 slums had been cleared but since that time the emphasis has moved to rehabilitation. The city has declared both general improvement areas and several renewal areas where action was needed. In these, it is hoped to save about 70,000 dwellings in a ten-year plan, extending their life by at least 15 years and some by 30 years.

In the 60s Birmingham built an enormous number of tower blocks to rehouse families in the mode of the times. Forty per cent. of the city's present housing stock is in flats of various heights, about 500 blocks in all. There has been no building of high-rise flats since about 1970 and the council's present policy is to provide mainly two-storey buildings. Sixty-three per cent. of all new council housing in Birmingham at present is one- or two-bedroom, reflecting the city's inherited stock of older-type three- and four-bedroom houses.

The official council house waiting list is at present 32,000. This has crept up over the last few years aided by the fact that during the private housing

boom in the early seventies few fresh starts were made. In 1972 only 1,500 council dwellings were completed, whereas the five year building programme allows for 5,000 a year. Last year 3,700 homes were completed and it is hoped that the number for 1975 will be 4,800.

Birmingham has already had to go outside the city boundaries for building land—as, for instance, when it built the controversial Chelmsley Wood development of about 15,000 dwellings in what was Meriden and is now Solihull. The council is likely to run out of build-

ing land in the city by the end of the seventies but has two substantial parcels of land in North Worcestershire and in Sutton Coldfield. Already council houses are being built in North Worcestershire for both sale and to let.

Scheme

At present the city council does not sell council houses to sitting tenants but will sell property to existing tenants and to people in need. In particular to help this latter category the city has developed a new mortgage scheme, the half-and-half mortgage scheme, as in the present economic circumstances its normal mortgage funds have dried up for this year. The half-and-half mortgage scheme allows for a man to half-buy and half-rent his house, with the inbuilt ability to buy the other half at any time he is able to afford it. The council hopes to house many more people with this revolutionary scheme which is being watched with interest by outsiders.

As for the private housing market, this remains sluggish in the higher priced houses, over about £25,000. But since Easter the market has quickened in cheaper and medium-priced housing and a number of builders have been seeking sites for new housing developments, mainly moderately priced. Prices in Birmingham are still higher than in the surrounding areas and a modern three-bedroom house would not go for less than around £9,000 to £10,000. Towards the city centre, there has been some building of luxury flats and in Edgbaston in particular luxury homes and flats are being offered from £20,000 up to £40,000.

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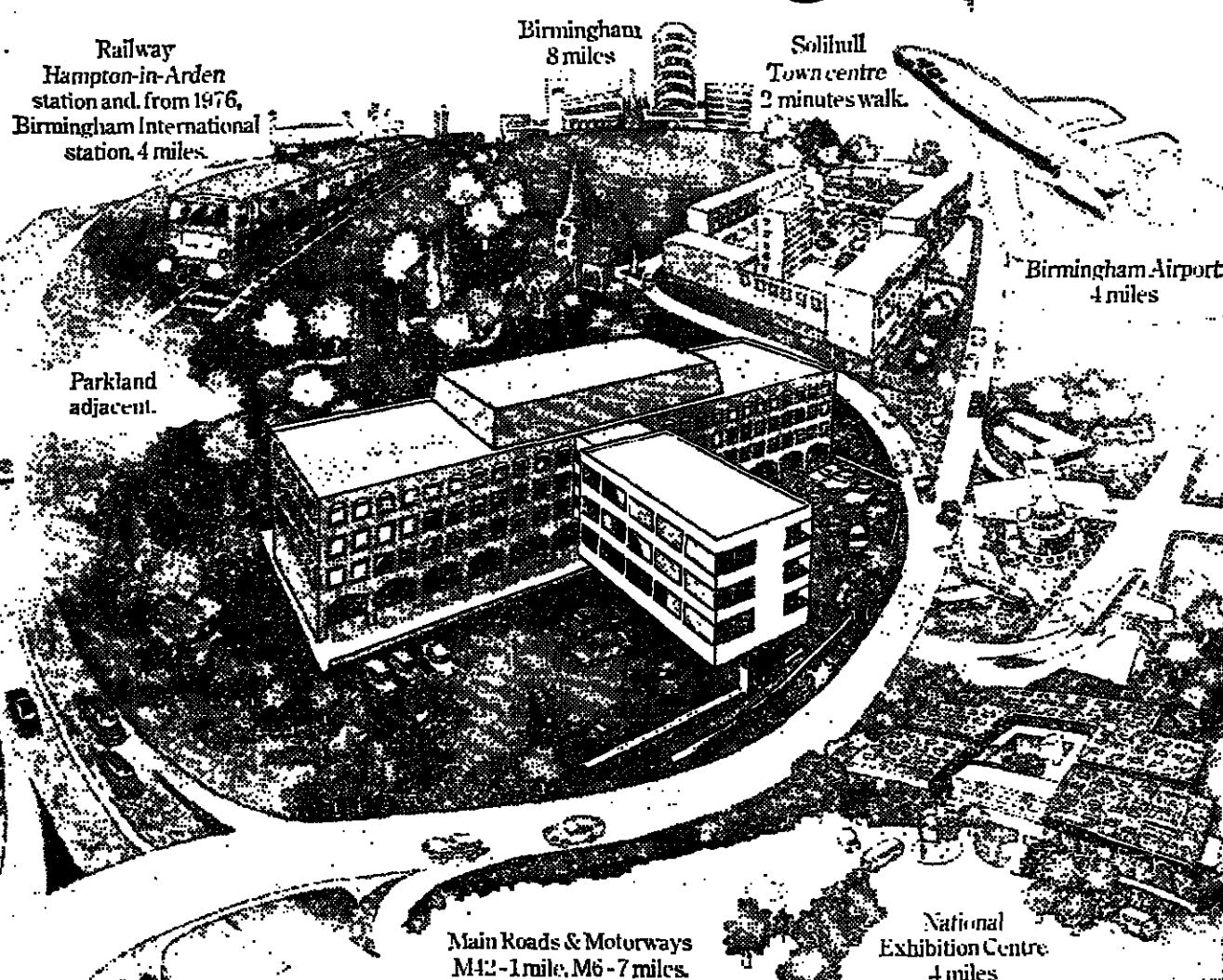
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Leisure

CONTINUED FROM PREVIOUS PAGE

eries at which their works can be shown. For the cinematophile, the Birmingham Film Festival provides an opportunity to break away from the traditional fare of most of the city's cinemas and to see a wide range of films from many countries, few of which ever have the chance of screening their productions in this country.

In terms of leisure facilities, Birmingham and the Midlands as a whole are generally under-rated and in fact offer just about all that the most demanding of pursuitists might want.

Certainly, there are areas which are over-industrialised and others, diminishing in number, where slums of a Dickensian nature have not yet

been erased. Even so, the Birmingham region is rich in places not only of industrial archaeological value but also of considerable natural beauty. Within little more than half an hour's drive from the centre of the city one can be immersed in the character of the Black Country; be surrounded by the rich agricultural lands of Warwickshire or Worcestershire or be visiting one of the region's many fine buildings of architectural or historic interest.

Travel a few miles north of the city and one is within the scenic delights of Cannock Chase—admittedly scarred a little by over-use in some places—with its vast acreage of forest and heathland, beautiful

walks and superb views over Shropshire's hills. Go east and one comes into the pastures of Warwickshire, with its timbered and Georgian country houses; south are Worcestershire's fruitful vales and ancient towns; and to the west is Shropshire and the Welsh border counties, with their dramatic hills and valleys and their fishermen's havens.

If it all sounds a little like something from a travel brochure, it is because this is what Birmingham has been trying to get across to visitors to the region who still tend to skirt its boundaries and fail to appreciate that the city is now entitled to claim that it is a tourist centre.

Depending upon the interests of the visitor, there are a considerable number of attractions within Birmingham itself. They include excellent restaurants, which have proliferated in recent years and deserve to give the city a better reputation among gourmets than it presently possesses; night clubs which have discarded the "blue" image of a few years ago and offer a degree of sophistication which would cost considerably more in London; modern hotels, which, particularly since the start of the National Exhibition Centre building programme, have increased in both number and quality. The range of interests also covers museums, art galleries, cathedrals and churches of historic or architectural interest and the city's many parks which provide refreshing "lungs" of open space and are also the sites for various leisure festivals.

In terms of sports facilities Birmingham has a good reputation which may get still better

if plans for a sports complex to attract the Commonwealth Games do not finally founder on economic problems. Both in the city itself, and in most of the major towns nearby, there are, despite the heavy industrialisation, municipal and private golf courses, sports centres or halls, boating facilities, pitches for amateur football, cricket, hockey, netball and courts for tennis and squash.

The West Midlands Sports Advisory Council reported in 1969 on the minimum requirements for the region as a whole for swimming pools, golf courses and indoor sports facilities to be provided by 1981. Five years later its progress report indicates that of the 58 golf courses envisaged, seven 18-hole and one nine-hole have been completed and a further eight 18-hole and five nine-hole are firmly proposed or are under construction. Twenty swimming pools were suggested and this figure has already been exceeded, 23 having been built and a further nine being under construction. On the other hand, indoor sports centres have fallen behind and the need for their construction is being pressed. Basic minimum requirements suggested by the Advisory Council, were for 102 indoor centres but so far only 20 have been completed and a further 16 firmly proposed or under construction.

In many ways Birmingham itself is fortunate in that, though more leisure facilities will always be needed to keep pace with growing demand, it already possessed a reservoir of established recreation and leisure areas, before local authority spending had to be cut back so drastically.

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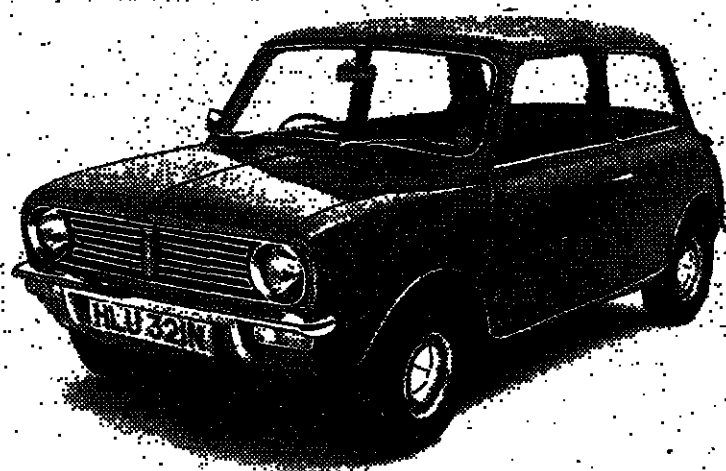
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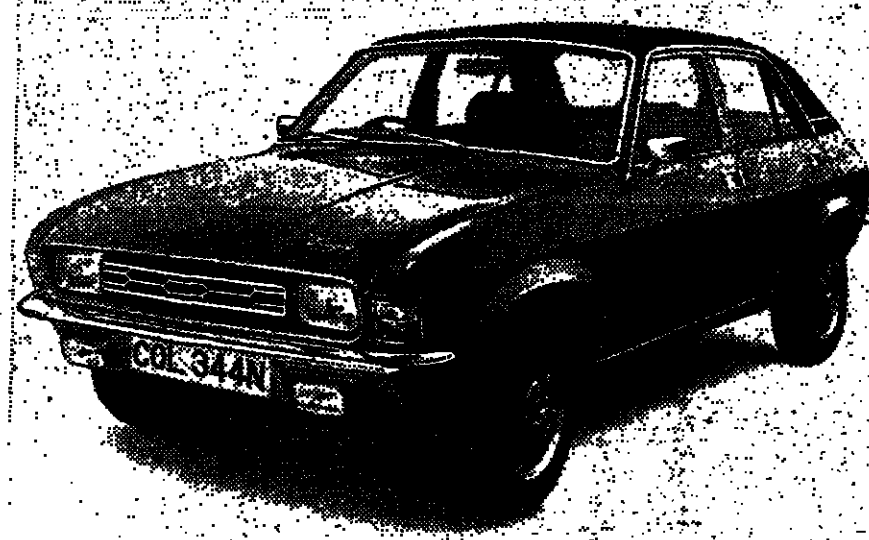
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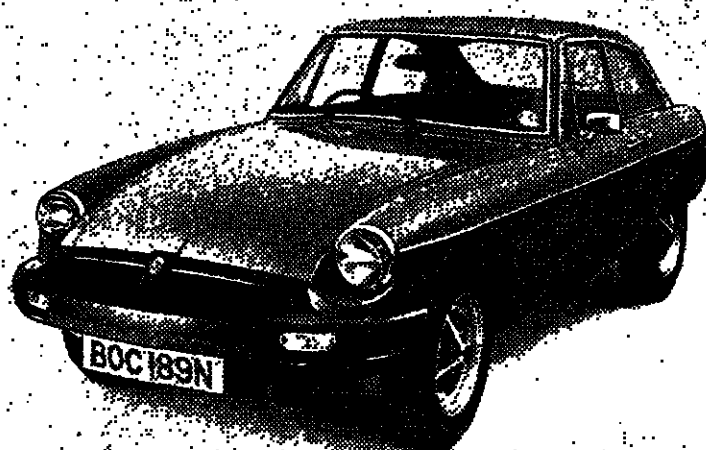
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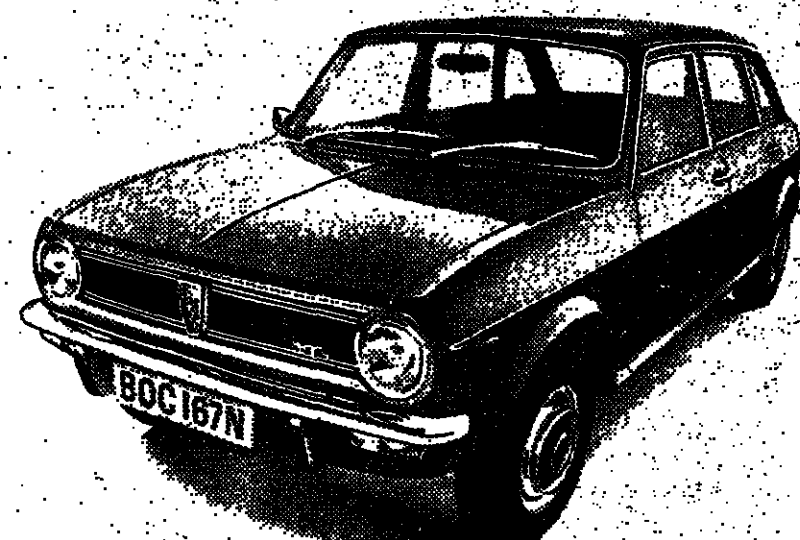
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EMI has just announced a major film production package. But this sort of fillip to U.K. picture-making has now become a rare event

A whale of a time in the U.S. cinema

BY ARTHUR SANDLES

THERE was a touch of sadness in the way in which Mr. Nat Cohen, EMI's film production chief, commented on the British cinema business last week. Mr. Cohen was lifting the wraps on EMI's 1975-76 production package and thus giving U.K. film-making one of its rare latter-day fillips. But when asked about the number of people now going to the cinema his face clouded a little. Yes, he said, they were pouring into the picture houses in Italy, the U.S. and Canada, but the best that could be said about Britain was that things were marginally better than last year. "In the U.K.," he remarked, "we have betting shops and bingo. It was hardly surprising therefore that much of the EMI package was 'international' in design. The days when even a modestly budgeted film could cover its costs from U.K. exhibition alone are over, and to make the jump from localised product to the international big league costs a great deal of money. It is a game which only Mr. Cohen, with Sir Bernard Delfont and Mr. John Read behind him, and Mr. Delfont's elder brother, Sir Lew Grade at ATV, seem willing to play on any grand scale in Britain at the moment.

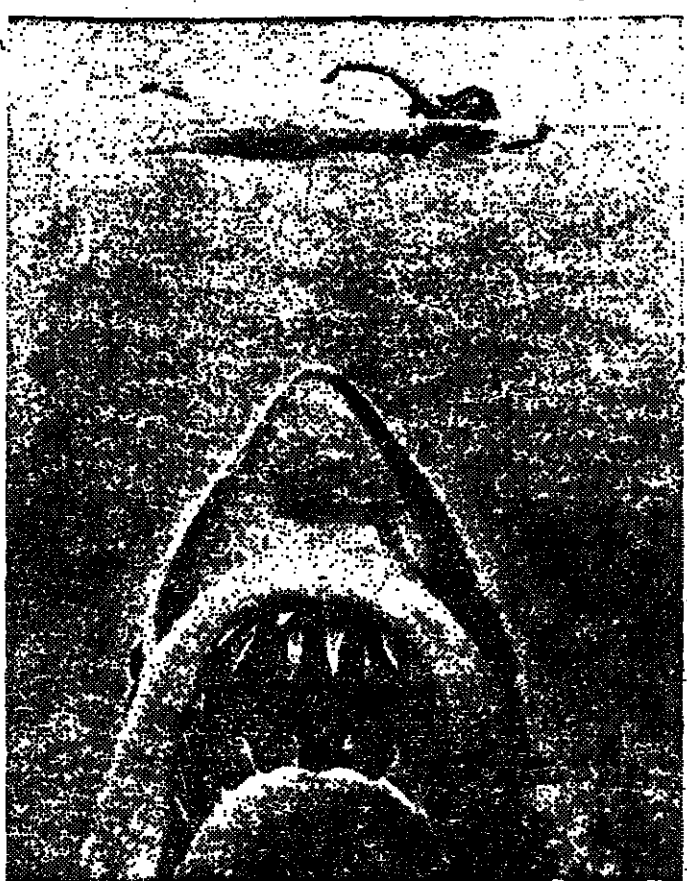
Techniques

Jaws is yet another example of the way in which the film business to-day has adapted itself to modern sales techniques. There was a spell in the 1960s when the film business seemed to have lost its way. Film publicity had a look of old hat about it and films tended to be sent out to fend for themselves. To-day a film is nurtured towards its premiere with both care and cash. And provided both are applied with a degree of sophistication the result can be spectacular.

Nurturing for the film Jaws included the use of a best-selling book, a brilliant publicity campaign in which the advertisements became so well known that they soon became household names enough for cartoonists to use them as a basis for lampooning Congress, and a public relations effort whose final triumph was a cover story in Time magazine even before the film opened.

The film itself, from all accounts, is better than the somewhat pedestrian book, and concerns the anti-social activities of a 24-foot white shark and its impact on a small seaside town. Launched in the U.S. just as the summer holiday season started it has proved quite successful in reducing the number of deep sea bathers.

Summer is not the best of times for the release of pictures in the U.K. and the British pub-



Jaws—\$8m. to make, an eventual gross which could be around \$150m., and a reduction in the number of deep-sea bathers.

lic is less concerned than people living in warmer climes with things underwater. Thus British cinema audiences are not likely to see the film until the industry's boom time, Christmas, when, much to the gnashing of commercial teeth from Rank, it goes to EMI for a "mass release." EMI should thus get the best of both worlds, with

boasts only one fully fledged film studio, Pinewood, compared with four in the sixties. EMI's cheap by most standards. Jaws was budgeted at \$4m. and cost a reported \$8m.—a small sum, however, compared with the eventual gross which could be around \$150m., but quite a lot of money to lose if the picture had happened to be a flop.

Piratical

In fact a loss on that scale would probably scupper the whole of EMI's film programme unless there was something in it to produce a huge compensating profit. Since EMI is such an important financial and psychological element in British film-making it would be alarming if such a loss were to be incurred since it might crush British film enterprise for ever. Mr. Robert Bort, writer and president of the Association of Cinema Television and Allied Technicians, said recently: "In America the investors want piratical profits, but they are prepared to take piratical risks. Here the moneyed class has lost its nerve and organised labour is just mindlessly rampant—and the two are on collision course."

Britain did, in fact, have a period of enthusiasm for high investment in films in the early seventies, but the results, including those first few months of EMI investment, were hardly encouraging. Morgan Grenfell's excursion into film financing was a disappointment and a number of other investors backed off. This retreat coincided with a final confirmation of the American withdrawal. Relatively little money is spent by American film-makers in the U.K. these days, which is one of the reasons why Britain now

LONDON'S TOP FIVE FILMS

FILM, CERT., DISTRIBUTOR	CINEMA
Tommy, AA (Mendale)	Leicester Square Theatre
Emmanuelle, X (SF)	Prince Charles
Shampoo, X (Col-War)	Odeon, Haymarket
Wind and the Lion, A (Col-War)	Dominion
Brannigan, A (United Artists)	Odeon, Leicester Square

Listed in order of latest available one-week receipts. Source: Cinema TV Today.

TOP FIVE FILMS IN THE U.S.

FILM, CERT., DISTRIBUTOR	CINEMA
Jaws (Universal)	Leicester Square Theatre
Return of the Pink Panther (United Artists)	Prince Charles
French Connection II (Fox)	Odeon, Haymarket
Shogun (Col.)	Dominion
Disney Festival (BV)	Odeon, Leicester Square

Source: Variety.

five years old is shown on television. That five-year rule runs the TV men into a period when films were beginning to get sexy and violent, and many of them are unsuitable for the 7 p.m. family viewing slot. More recently produced films have tended to be spectacular rather than shocking and now the television industry is looking hungrily at these. Paramount Pictures, Gulf and Western's film-making subsidiary, has agreed in principle at least to sell the television rights of *Godfather Parts I and II* for more than \$15m. to National Broadcasting for one showing next year. The same company has already sold a package which includes *Great Gatsby*, *Chinatown*, *Serpico*, and *Catch 22* for \$61m. to other television interests.

There is little doubt that the British cinema industry is looking to the coming winter for a revival in its trade. To some extent a deepening of Britain's economic situation might even help since when things get bad people have a tendency to go to the cinema.

Perhaps by next Christmas we may all be comforting ourselves against financial chills by watching Americans being gobbled up by giant sharks on the New England coast.

Pressure

It is not thanks to any particular love of television that the film industry makes these sales. It is simply because no manufacturer can afford to have stock resting on his shelves in

Can architects cope?

From Mr. J. Stiefel and Mr. S. Beare

Sir—We cannot accept that Sydney Paulsen's article on July 7, "Can Architects cope alone?" shows incredible ignorance of the way architects work, which is the view expressed by Sir Thomas Bennett in his letter of July 10. What is surely important in the provision of new facilities for a client is to establish who is the person best equipped to ensure that objectives for a project laid down as a result of a feasibility study are realised in practice. This invariably must include objectives for return on the additional capital (shareholders' funds) invested in the new facilities.

It is vital to have someone to manage the project, someone who is accountable to the managing director, as custodian to these funds, to ensure that financial objectives are met. Such management is imperative from the outset of the project and is, therefore, just as important during planning and design as during construction, and finally commissioning. This is surely the main point of Sydney Paulsen's article and with respect to Sir Thomas and his architectural colleagues they are not the right persons to act in the project management role.

This country needs industrial enterprise, and industry badly needs investment. The client must seek the best management he can get to ensure new facilities are wholly suitable for his needs and that he gets value for money.

We are project managers and we totally support a system where the client can feel part of the project, where he gets what he wants and what, so often, he has been persuaded to have, where he can see that performance is continually being monitored against financial objectives.

Client controlled projects with temporary executive management is a new, yet proven, approach. The significant financial benefits to cost-cutting and to ensure that it becomes the rule rather than the exception.

John Stiefel, Stuart Beare, 21 Poplar Avenue, Orpington, Kent.

Tendering in the EEC

From The Head of Division, Directorate General for Internal Market, Commission of the European Communities.

Sir—An article on public tendering in the EEC (June 24) gives the impression that existing rules, applying to local authorities would be extended to Government bodies under the proposed directive at present being discussed in Brussels. Both Government and local authority purchasing, however, are already subject to EEC Council directive 70/32, which prohibits discrimination in the award of public supplies contracts. The proposed directive mentioned in the article is intended to reinforce this prohibition by laying down certain tendering procedures, particularly with regard to publication of contract notices. A directive is already in force which requires similar procedures to be followed for public works contracts (EEC Council directive 71/305).

Your correspondent is right in saying that the EEC Commis-

Expense and delay

From the Secretary General, The Law Society.

Sir—Justianian (July 7) comments upon the expense and delay of litigation and says that "In an age of economic stringency, the lawyers cannot escape the responsibility of devising an effective and efficient system for the resolution of disputes, that does not involve an inordinate amount of judicial manpower and does not cost more than is reasonable for the type of dispute."

Over the past 50 years, two Royal Commissions and three Departmental Committees, appointed by the Government of the day, have studied and reported upon the problems of procedure, delay, and costs in litigation, but no far-reaching inroads into the process of litigation have been made.

The Law Society agrees that an up-to-date and urgent review of the whole process is necessary and as reported in the Society's Gazette of June 25, a working party under the chairmanship of Mr. M. Williams, chairman of the Contentious Business Committee of the Council, is to undertake this task.

J. L. Bowring, The Law Society's Hall, 115 Chancery Lane, W.C.2.

Brokers and commission

From Mr. J. Halliday.

Sir—I am very concerned to read (July 7) that the three major insurance broking organisations have agreed with the Life Offices Association, and Associated Scottish Life Offices, the new commission structure for life policies, about which negotiations have been going on for the past few months.

Although the concept of a commission based on premiums paid as opposed to the sum assured basis is acceptable, the strength of information which is available, there can be no justification whatsoever for the major broking organisations accepting these terms which, if implemented, will in the long term have a serious effect on the life insurance industry as a whole. It seems to me that the insurance companies are seeking to introduce this revised method of commission payment on the basis that they consider there has been "bad selling" in the past by the unscrupulous broker. These proposals will not produce an emphasis on selling short to medium term investment contracts which will require heavy premiums.

Furthermore, it seems obvious that the proposals will not eliminate early lapsing of contracts but will increase cancellation and replacement and will only marginally improve surrender values for the young, mostly at the expense of the older lives.

The market will obviously become distorted as a result of the promotion of short term investment contracts while at the same time discouraging the sale of long term protection policies thus neglecting the interest of the consumer.

Letters to the Editor

Although the gas industry may look askance at Sir Mark's suggestion, one wonders from a national viewpoint whether he may not be right to question the present system. When gas tariffs in their present form were developed, the "energy crisis" had not hit us and it was in the interests of the profits of the gas industry to encourage sales through promotional tariffs which reflected the cost structure and covered marginal costs. Now, however, the position is different. It is in the national interest any longer to encourage the greater use of energy through promotional tariffs, particularly at a time when the Government is actively pursuing a policy of conservation?

Thus, under the present (and foreseeable) circumstances, it may be in the national interest (although not necessarily in the short-term interests of the gas industry) to restructure tariffs on the basis of a standing charge, a low rate for limited consumption and then progressively higher rates for higher levels of consumption. It would be interesting to know whether work along these lines has been carried out either in the gas industry or in the Department of Energy.

Allan A. S. Rodger, Maxwell Street Associates, 55-63 Goswell Road, E.C.1.

Promoting sales

From Mr. J. Goodland.

Sir—You report the chairman of the National Gas Consumers' Council (July 9) as being "very unhappy" about the proposed 20 per cent tariff rise. Naturally! Her job must be to represent the interests of present consumers. Looking a bit further ahead, however, is it in the long-term interests of consumers that gas, with its short-lived natural life, should be dissipated in a very few years by increasing sales to non-gas users for it to be replaced by a more permanent fuel? Is it fair to be faced with large increases once gas prices reach an economic or European level?

Lady Macleod could have been insisting that British Gas Corporation ceases its present promotional campaign, unsuccessful as it is, and that the Press by the "Save Energy" slogan, until assured sources are found to see all existing gas appliances through their natural life, come what may, come weather. Natural gas, the experts tell us, is too good to burn, a premium fuel. The cheaper it remains the faster it will disappear, and then where will gas-consumers go? Back to coal!

J. H. Goodland, Down House, Pileigh, Taunton.

Gas tariffs change

From Dr. A. A. S. Rodger.

Sir—Your report (July 9) that Sir Mark Heng, vice-chairman of the National Gas Consumers' Council, has suggested that promotional gas tariffs should be phased out, is of considerable interest. As reported, Sir Mark's argument is that a household should be able to know from his meter how much his gas bill should be. But a number of points emerge.

Gas is normally sold on a per therm basis but meters measure in cubic feet, so that even if tariffs were to be "simple", the consumer would still have to carry through an arithmetic calculation from cubic feet to therms. In making a gas supply available to the customer, a large amount of "fixed" overheads have to be made—the service, the meter, the reading of the meter—even though the consumer actually consumes no gas, thus the justification for a standing charge. The implications, therefore, for the gas industry of Sir Mark's suggestion, are extremely important; it seems to be a case of "fairness" and "simplicity" overcoming all thoughts of relating tariffs to costs.

attitude to the advertising industry.

The paper published by the SPD is called "Suggested Aims and Requirements for Advertising" (Zielvorstellungen und Forderungen zur Wirtschaftswerbung) and states quite clearly that the party acknowledges and approves competition in economic activity and appreciates the position of advertising as part of a market economy. The paper also lists 12 points concerning misuse of advertising and asks for stricter measures to ensure that misleading advertising will in future be prevented.

It is hoped that this paper will be studied with perhaps a more open mind by members of our Labour Party—particularly those members with a preconceived idea or one-sided view of our industry.

John R. Boardman, 25, Kenys House, Dolphin Square, S.W.1.

Machine tool industry

From The Managing Director, FMI-MEC.

Sir—Kenneth Gooding's article of July 3 on the machine tool industry painted a gloomy, but realistic picture of the world market situation.

Our own experience, however, suggests that even in this current very depressed state there are still opportunities for the enterprising company to sell, export and be profitable. Unquestionably machine tools are still being brought into the present climate of the buyer who is no longer confronted by the very extended deliveries which characterised the recent boom period—can afford to be extremely discriminating. This holds true for any manufacturer trying to sell machine tools without something new in the way of features, facilities, or user advantages. U.K. manufacturers still offer machinery where design, facilities and styling have remained predominantly unchanged for many decades.

The once-captive U.K. market and short sighted policies regarding the needs of overseas buyers must be underlined as one of the major factors contributing to their present difficulties. Our competitors overseas are alive to this situation, they do supply machinery which is updated, efficient and attractively styled and are thus able to sell against U.K. suppliers in spite of the tremendous price advantage which we have in international selling.

At present our domestic market is far from providing the healthy base from which export activities would normally be built, but I suggest that we can be blinded to the opportunities that exist if we give too much consideration to this situation. In this country we have all the expertise and certainly all the ability which is necessary to allow us to design and style machine tools which can more than compete with the best that the rest of the world can offer, but I regret that so many years of inactivity strongly suggests that we lack the will, or it is the drive, for all but a handful of us to do something about it. Let us hope that the entrepreneurial companies are given even greater scope for helping to cure the present ills of the industry.

D. S. Love, Charlwood Road, East Grinstead, Sussex.

To-day's Events

GENERAL: Provisional U.K. trade figures for June published, incorporating import and export unit value and volume index and terms of trade. Mr. James Callaghan, Foreign Secretary, continues his official visit to Poland. Mrs. Barbara Castle, Social Services Secretary, speaks to Women's National Commission, Guildhall, London. PARLIAMENTARY BUSINESS: House of Commons: Debate on problems of Agriculture Industries. Remaining stages of Northern Ireland (Emergency Provisions) (Amendment) Bill: Motion on Appropriation (No. 2) (Northern Ireland) Order. House of Lords: Lotteries Bill, third reading. Sex Discrimination Bill, committee: Weights and Measures Act 1963 (Dried Vegetables) Order, 1975: Weights and Measures Act 1963 (Cereal, Breakfast Cereals and Oat Products) Order, 1975: Weights and Measures Act 1963 (Flour and Flour Products) Order, 1975.

OFFICIAL STATISTICS: Turnover of catering trades (May). Wholesale price index numbers (June). COMPANY RESULTS: Crown Hope (full year). Rothchild Investment Trust (full year). COMPANY MEETINGS: See Week's Financial Diary on Page 4. SPORT: Cricket: First Test, England v. Australia, continues. Edgbaston.

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COMPANY NEWS + COMMENT

Triplex Foundries expansion to continue

ALTHOUGH BUSINESS is somewhat patchy at the moment, Triplex Foundries Group seems to be in a better position than most, due mainly to the widespread range of customers and industries served and also to the programme of expansion and improvement of recent years, states chairman Mr. R. Harrison.

The very much improved profit—up from £14,788 to £1,346,400—for the year ended March 31, 1975, has shown the value of this expenditure and due to strict control of finances and to tax deferral the group has improved its liquid position by some £470,000—including a reduction of £355,000 in the overdraft—despite net expenditure of £336,000 for the year.

In these circumstances the directors intend to continue the present policy of expansion and improvement and provided the economic situation does not set out of hand "we would expect to finance the further capital expenditure out of the group's available resources," says the chairman.

He tells members that the new mechanised plant in Vowles ferrous foundry has now commenced its initial trials and will shortly give the needed extra capacity, improving sales and profitability of the division. As soon as this phase is completed, it is intended to follow on with planned projects to improve and increase not only the capacity of the iron foundry but also the malleable and aluminium foundries.

The engineering division too continues to prosper and "we are continually striving to improve and increase the strength of this division." The group is continuing to spend additional monies to further develop these companies. "Not only can we expand even more in the U.K. but we also have a very large potential in Europe... and now that the Referendum is settled, we look forward to the expansion of our sales in this market," states Mr. Harrison.

As far as the other activities division is concerned, main opportunities for expansion lie in the protective clothing and plastics companies. In both of these "we are doing very well," he reports.

Meeting, Tipton, August 5 at noon.

comment

For a group which increased its pre-tax profits by 47.2 per cent last year against a turnover rise of 34.2 per cent, Triplex Foundries is on a very modest rating. Although the current price of 44p is a considerable improvement on the 1973 low of 19p, this still leaves the yield at 12.4 per cent (almost 4 times cover on the dividend) and the p/e at very little over three. With two-thirds of both turnover and profit coming from the foundry division, the group is clearly vulnerable to the effects of recession on its industrial customers and the report does comment briefly on the "patchy" situation at the moment. Given that this does not sound particularly encouraging, the share price still seems to be discounting the worst, considering the strength of the dividend cover and the expectation that further capital expenditure will be financed from the group's available resources.

HIGHLIGHTS

The week-end's postbag was rather light of company reports, but Lex discusses the implications for the corporate sector of Friday's White Paper and the £20m. rights issue by Reed International's main Canadian operating company. Looking forward this week, there is a fair sprinkling of investment trust results, starting with Rothschild Investment Trust today. But the main emphasis is on the drinks sector, with Distillers and Scottish and Newcastle Breweries as the leading heavyweights on Thursday. Other sectors are also represented during the week with results expected from Thorn, Wilkinson Match, Davy International and Montague L. Meyer.

NCR turns in £2.25m. midway

FOR THE six months to May 31, 1975, NCR, a wholly owned subsidiary of NCR Corporation of the U.S., reports a taxable profit of £2.25m. compared with £1.97m. in the corresponding period and £2.82m. in the last full year. The directors say that although turnover for the whole of the current year is expected to be greater than last year, it is anticipated that trading profit will be less due to rising costs and price controls which are reducing profit margins.

Provision has been made in the first half for exceptional costs, amounting to £200,000, arising out of the planned phase-out of certain mechanical products in the group's Dundee factories. A further provision may be required in the second half, add the directors.

Half-yearly figures

	1974-75	1973-74	1972-73
Turnover	25,894	24,085	23,474
Trading profit	2,251	1,971	2,821
Exceptional profit	—	—	—
Profit before tax	2,251	1,971	2,821
Other charges	—	—	—
Profit after tax	2,251	1,971	2,821
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Exports totalled £0.25m. (£0.15m.). At March 31, 1975, Crescent Group (Holdings) held 29.33 per cent of the voting capital. Meeting, 202 North New Road, N, on August 6 at 11.30 a.m.

Reed Intl. offshoot to raise £20m.

Reed International announces that its principal Canadian operating company, Reed Paper, is planning to raise some Can\$40m. (£20m.) by way of a rights issue. The issue will be on the basis of one new share for every three shares held by holders of Reed Paper's common shares at £17.50 or one Preferred share at £18.75.

Reed International's Canadian holding company, Reed Paper Holdings, will subscribe for its full entitlement of common shares at a total cost of \$40m. These funds being provided out of foreign currency already held by Reed Paper Holdings.

The Reed Paper Holdings holds all the common shares of Reed Paper representing 86 per cent of the equity assuming full conversion of the Preferred shares. The funds raised by this rights issue will be applied in repaying bank loans incurred by Reed Paper in acquiring Gold Crest Products and Alpha Industries and in financing previously announced modernisation and expansion of Reed Paper's pulp and paper facilities.

See Lex

CU loan stock conversion

Commercial Union Assurance has announced that in accordance with the terms of a 1968 agreement between the company and Munchener Ruckversicherungs-Gesellschaft and Allianz Versicherungs-Aktiengesellschaft, the £2.5m. 4 per cent, unsecured convertible loan stock issued in January 1973, together with £37,599 retained profit from the year 1974/5, the budget level of business will be financed by borrowings at about the same level as the previous year and certainly within the facilities available.

As reported on June 12 turnover was up from £31.1m. to £37.3m. and pre-tax profit increased slightly from £0.25m. to £0.27m. for the year to March 31, 1975. Dividend total is up from 1.25p to 1.37p net for which Treasury consent has been obtained.

A split of sales, excluding VAT, shows watch division £2.63m. (£2.31m.), cutlery £0.95m. (£0.7m.), electronics £0.15m. (nil).

The directors continue to investigate products in the electronics field suitable for marketing by the company. The chairman feels there are good possibilities of the electronics division contributing to future group profits.

He reports that the directors are exercising very strict control on the amount of stocks held by each division. For the current year they expect that with the full benefit of the tax deferred in January 1975, together with £37,599 retained profit from the year 1974/5, the budget level of business will be financed by borrowings at about the same level as the previous year and certainly within the facilities available.

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Mr. J. H. G. Gilbert, chairman of Wilkinson Match, which is to-morrow due to announce preliminary results for the year ended March 31, 1975.

Progress at Weston Pharm.

BECAUSE of the uncertain economic climate there have been no major changes in any of the operating divisions of Weston Pharmaceuticals but the directors have concentrated on the improvement of marketing policies, the rationalisation of inventory mix, the introduction of new stock control systems and tighter credit control, says the chairman, Mr. R. Weston.

He tells members in his annual statement that in the retail division, 14 smaller and uneconomic branches have been closed. Expansion has taken place, however, with four new acquisitions and one new unit opened in addition to major extensions to eight branches. Sales have increased by 15 per cent and it is estimated that the division has achieved comparable growth in real terms of about 5 per cent.

Mr. Weston confirms that group sales and operating costs are in line with budgets for the first quarter and, although the present uncertain economic environment is hardly conducive to long-term forecasting, the directors feel that the group is well placed to face the future.

As known, pre-tax profit increased 18 per cent to £1,57m. for the year to February 28, 1975. Dividends are up from 1.943547p to 2.11204p net.

The ultimate holding company is Banque Nationale de Paris of France.

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Expansion by Banque Nationale

Net profits of the Banque Nationale de Paris Ltd. expanded from £1.53m. to £2.33m. in the year ended March 31, 1975, of which £1.26m. (£0.66m.) is attributable to the 32.5 per cent interest in the United Bank of Africa.

Chairman Sir Patrick Reilly reports that the steady progress and satisfactory profits achieved in the year are based on an all-round expansion of the business. Penetration of the U.K. market and development of operations in the field of international trade have been "particularly rewarding."

Regarding Britain's decision to remain in the EEC, the chairman says the company is "greatly encouraged" by this and can now confidently pursue its long-established policy of sound and steady expansion. At the year-end total assets showed an increase from £175.46m. to £262.83m.

The ultimate holding company is Banque Nationale de Paris of France.

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INTERNATIONAL COMPANY NEWS + EURO MARKETS

EUROBONDS

Two issues claim limelight

BY PAULINE CLARK

TWO new issues claimed the limelight in the primary market last week, but more for their curiosity value than for their significance to the market as a whole. In order of appearance, these were the £250m. planned for Beneficial Corporation of Delaware and the DM100m. lined up for ICI International Finance of Bermuda.

The Beneficial issue is the first Canadian dollar bond to be brought out by a non-Canadian concern while the ICI offering is of special interest simply because it is British.

Both issues are for U.S. rated prime companies which, in the Beneficial issue, offsets to an extent the nervousness about the

currently rather poor outlook for the Canadian dollar, and in the ICI issue gives it a head start in a market that is at present suffering from over-saturation.

The Canadian dollar bond is unconditionally guaranteed by the prestigious parent company, Beneficial Corporation, and has been issued in Canadian dollars because the funds are to offset short term debt in the group's Canadian subsidiaries. For the convenience of using this currency, the group is paying a 9½ per cent coupon whereas it might have got away with 8½ per cent had it chosen U.S. dollars.

The bonds are also only for five years, which ensures a good reception.

Meanwhile, ICI International's 8½ per cent seven year bond, guaranteed by the parent company, Imperial Chemical Industries, is also expected to benefit from its international fame. To this extent it is not seen as being a true test of market reaction to U.K. issues. There is also added international prestige in the fact that ICI was given a Moody's triple-A rating only last month when it floated a \$100m. bond in New York. This has been well received in spite of a coupon of only 9.05 per cent compared with the 9½ per cent, some prime graded American companies are having to pay at present.

GDF deficit rises

PARIS, July 13.

THE FRENCH state utility Gaz de France (GDF) said it had an operating deficit last year of Frs.231.6m. compared with a deficit of Frs.12.5m. in the previous year.

Last July however, the utility was forecasting a deficit of at least Frs.450m. for 1974. Turnover last year rose to Frs.5.8bn. (Fr.5.4bn.) while gas consumption rose by 7.3 per cent to 115.6bn. therms.

Commenting on the sharply higher deficit, GDF said that provided a reasonable pricing policy is followed and sales continue to expand, the poor results of 1974 should not be repeated. Given the increase in gas tariffs at the start of the year, 1975 should be more satisfactory.

It stressed the need for financing to be based on a pricing policy which would follow the overall energy market structure, while maintaining the industry's competitive position.

Investments in 1974 rose to Frs.1.4bn. (Fr.1.2bn.) and according to earlier forecasts should reach Frs.1.9bn. in the current year.

Cash flow for 1974 was Frs.72m. (Fr.83m.).

Further SEL capital authorised

STUTTGART, July 13.

STANDARD ELEKTRIK LORENZ (SEL) says that it has received DM50m. of authorised capital for use over the next five years on top of its present basic capital of DM334m.

Increasing orders in the first half of 1975 fell by 20 per cent to DM1.1bn., so that orders in hand have now dropped 14.7 per cent to DM1.48bn. turnover in the period fell by 15.3 per cent to DM1.08bn.

The workforce has dropped by 6.3 per cent to around 35,000 since January. Chairman Herr Dieter Moehring fears that further cuts might be needed. Already announced group profit in 1974 was DM129m. (135.7m.) on sales 11.5 per cent higher at DM2.7bn. The 1974 dividend is DM3 (same). SEL is 99.44 per cent owned by International Standard Electric Corporation.

AUSTRALIAN WEEKLY LIST

Australian \$	July 11	July 4	Australian \$
Advertiser Newspaper	11.25	11.25	KWJ Int.
Adelaide Express	10.65	10.65	M.I.A.
Adelaide News	10.50	10.50	Mauri Bros.
Adelaide Times	11.25	11.25	Mayne Nickless
Adelaide Weekly	11.05	11.05	Neyr Corporation
Adelaide Daily	11.05	11.05	Oglethorpe
Adelaide Evening	11.25	11.25	Ovenshoe Corporation
Adelaide Morning	11.25	11.25	Peterborough
Adelaide Night	11.25	11.25	Peterborough & Co.
Adelaide Sun	11.25	11.25	QJB
Adelaide Star	11.25	11.25	QJB
Adelaide Herald	11.25	11.25	QJB
Adelaide Journal	11.25	11.25	QJB
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INSURANCE, PROPERTY, BONDS

NOTES

Albion Anthracite Ltd. (a/c) 32, Hamilton St., N.Y. 1929-30 1930-31 1931-32 1932-33 1933-34 1934-35 1935-36 1936-37 1937-38 1938-39 1939-40 1940-41 1941-42 1942-43 1943-44 1944-45 1945-46 1946-47 1947-48 1948-49 1949-50 1950-51 1951-52 1952-53 1953-54 1954-55 1955-56 1956-57 1957-58 1958-59 1959-60 1960-61 1961-62 1962-63 1963-64 1964-65 1965-66 1966-67 1967-68 1968-69 1969-70 1970-71 1971-72 1972-73 1973-74 1974-75 1975-76 1976-77 1977-78 1978-79 1979-80 1980-81 1981-82 1982-83 1983-84 1984-85 1985-86 1986-87 1987-88 1988-89 1989-90 1990-91 1991-92 1992-93 1993-94 1994-95 1995-96 1996-97 1997-98 1998-99 1999-00 2000-01 2001-02 2002-03 2003-04 2004-05 2005-06 2006-07 2007-08 2008-09 2009-10 2010-11 2011-12 2012-13 2013-14 2014-15 2015-16 2016-17 2017-18 2018-19 2019-20 2020-21 2021-22 2022-23 2023-24 2024-25 2025-26 2026-27 2027-28 2028-29 2029-30 2030-31 2031-32 2032-33 2033-34 2034-35 2035-36 2036-37 2037-38 2038-39 2039-40 2040-41 2041-42 2042-43 2043-44 2044-45 2045-46 2046-47 2047-48 2048-49 2049-50 2050-51 2051-52 2052-53 2053-54 2054-55 2055-56 2056-57 2057-58 2058-59 2059-60 2060-61 2061-62 2062-63 2063-64 2064-65 2065-66 2066-67 2067-68 2068-69 2069-70 2070-71 2071-72 2072-73 2073-74 2074-75 2075-76 2076-77 2077-78 2078-79 2079-80 2080-81 2081-82 2082-83 2083-84 2084-85 2085-86 2086-87 2087-88 2088-89 2089-90 2090-91 2091-92 2092-93 2093-94 2094-95 2095-96 2096-97 2097-98 2098-99 2099-00 2100-01 2101-02 2102-03 2103-04 2104-05 2105-06 2106-07 2107-08 2108-09 2109-10 2110-11 2111-12 2112-13 2113-14 2114-15 2115-16 2116-17 2117-18 2118-19 2119-20 2120-21 2121-22 2122-23 2123-24 2124-25 2125-26 2126-27 2127-28 2128-29 2129-30 2130-31 2131-32 2132-33 2133-34 2134-35 2135-36 2136-37 2137-38 2138-39 2139-40 2140-41 2141-42 2142-43 2143-44 2144-45 2145-46 2146-47 2147-48 2148-49 2149-50 2150-51 2151-52 2152-53 2153-54 2154-55 2155-56 2156-57 2157-58 2158-59 2159-60 2160-61 2161-62 2162-63 2163-64 2164-65 2165-66 2166-67 2167-68 2168-69 2169-70 2170-71 2171-72 2172-73 2173-74 2174-75 2175-76 2176-77 2177-78 2178-79 2179-80 2180-81 2181-82 2182-83 2183-84 2184-85 2185-86 2186-87 2187-88 2188-89 2189-90 2190-91 2191-92 2192-93 2193-94 2194-95 2195-96 2196-97 2197-98 2198-99 2199-00 2200-01 2201-02 2202-03 2203-04 2204-05 2205-06 2206-07 2207-08 2208-09 2209-10 2210-11 2211-12 2212-13 2213-14 2214-15 2215-16 2216-17 2217-18 2218-19 2219-20 2220-21 2221-22 2222-23 2223-24 2224-25 2225-26 2226-27 2227-28 2228-29 2229-30 2230-31 2231-32 2232-33 2233-34 2234-35 2235-36 2236-37 2237-38 2238-39 2239-40 2240-41 2241-42 2242-43 2243-44 2244-45 2245-46 2246-47 2247-48 2248-49 2249-50 2250-51 2251-52 2252-53 2253-54 2254-55 2255-56 2256-57 2257-58 2258-59 2259-60 2260-61 2261-62 2262-63 2263-64 2264-65 2265-66 2266-67 2267-68 2268-69 2269-70 2270-71 2271-72 2272-73 2273-74 2274-75 2275-76 2276-77 2277-78 2278-79 2279-80 2280-81 2281-82 2282-83 2283-84 2284-85 2285-86 2286-87 2287-88 2288-89 2289-90 2290-91 2291-92 2292-93 2293-94 2294-95 2295-96 2296-97 2297-98 2298-99 2299-00 2300-01 2301-02 2302-03 2303-04 2304-05 2305-06 2306-07 2307-08 2308-09 2309-10 2310-11 2311-12 2312-13 2313-14 2314-15 2315-16 2316-17 2317-18 2318-19 2319-20 2320-21 2321-22 2322-23 2323-24 2324-25 2325-26 2326-27 2327-28 2328-29 2329-30 23

[illegible]

	July 11	July 10	July 9	June 8	July 7	July 6	Year ago
Government bonds	60.15	60.52	59.92	59.56	59.28	59.38	58.20
Foreign currencies	60.11	59.54	59.26	58.70	59.64	58.84	56.02
United States Treasury	315.8	324.3	327.6	326.4	317.7	323.3	258.7
Local money	363.0	372.1	368.5	375.5	381.0	382.4	357.1
Local money, excl. U.S. Treas.	6.46	6.25	6.30	6.22	6.49	6.28	7.69
Domestic U.S. Gov. bonds	19.09	18.49	18.34	18.40	18.90	18.57	20.34
U.S. Gov. bonds, excl. U.S. Treas.	7.49	7.78	7.80	7.77	7.57	7.70	7.68
Foreign bonds	5.081	5.686	5.117	4.792	4.923	5.173	5.384
Foreign currencies, excl. U.S. Treas.	—	33.17	69.69	64.28	34.70	46.58	33.26
Money, foreign bonds	13.769	14.889	12.697	11,651	12.808	13.625	12.65

[illegible]

	July 11	July 9	July 8	July 6	July 5	July 4	A year ago
Industrial group...	127.84	129.49	131.95	129.18	127.89	129.09	100.06
Div. Shares	140.47	142.66	145.94	143.69	140.70	142.41	107.86
Div. Yield per	6.31	6.20	6.10	6.21	6.30	6.32	7.58
P/E Ratio	6.95	7.06	7.18	7.05	5.94	7.02	6.48
All Stocks	137.58	139.76	142.13	139.55	137.71	139.25	105.81
Consumer Goods	14.01	13.91	14.10	14.00	13.79	14.28	14.96

AFIP International	91 1/2	Jacobs, Kroll	11 1/2
AFIP Irish Banks Ltd.	91 1/2	Ullmann	70 1/2
Anglo-Persian Bank	10 1/2	Kinghurst Securities	12 1/2
Henry Ansbacher	10 1/2	Knowsley & Co. Ltd.	11 1/2
Banco de Bilbao	94 1/2	Lloyds Bank	94 1/2
Banco de Jerez	101 1/2	London & European	11 1/2
Bank of Cyprus	110 1/2	London Mercantile	11 1/2
Banque du Rhone S.A.	10 1/2	Midland Bank	94 1/2
Barclays Bank	94 1/2	Samuel Montagu	94 1/2
Karnell, Christie Ltd.	94 1/2	Morgan Guaranty	94 1/2
Bank of India Ltd.	104 1/2	National Westminster	94 1/2
Bank of Mid East	91 1/2	Northern Comm. Trust	10 1/2
Brown Shipley	10 1/2	Norwich General Trust	10 1/2
Cayzer, Bavaria Co. Ltd.	101 1/2	Portman Guaranty	11 1/2
Cedar Holdings	30 1/2	P. S. Nelson & Co.	91 1/2
Charterhouse Japhet	104 1/2	Rossminster Accepts	94 1/2
C. E. Coates	10 1/2	Royal Trust of Canada	10 1/2
Consolidated Credits	12 1/2	Schlesinger Limited	10 1/2
Continental Trade Bk.	91 1/2	E. S. Schwab	11 1/2
Co-operative Bank	94 1/2	Security Trust Co. Ltd.	11 1/2
Copleys Bank	11 1/2	Shenley Trust	11 1/2
Corinthian Securities	94 1/2	Standard & Charterd	12 1/2
Credit Leornado	10 1/2	Sterling Credit	12 1/2
C. R. Dawes	11 1/2	Stevens & Co.	12 1/2
Dunlop Ltd.	11 1/2	Thames Guaranty	11 1/2
Duncan Lathers	10 1/2	Trade Development Bk.	91 1/2
English Transport	114 1/2	Twentieth Century Bk.	71 1/2
First London Sec.	94 1/2	United Bank of Kuwait	9 1/2
Amey Gibbs	10 1/2	Wallace Brothers Bank	10 1/2
Gauze Durrant Trust	10 1/2	Whiteaway Laidlaw	10 1/2
Geyhound Guaranty	94 1/2	Williams and Glyn's	91 1/2
Grindlays Bank	30 1/2	Yorkshire Bank	91 1/2
Guinness Mahon	91 1/2		
Hambros Bank	91 1/2		
Hartley Partners	11 1/2		
Hill Samuel	110 1/2		
I. Inare & Co.	91 1/2		
Julian S. Hinde	91 1/2		
Industrial Bank of Scot.	10 1/2		

Abbey Life Assurance Co. Ltd.		The City of Westminster Assur. Soc. v.		Hamble Life Assurance Limited v.		Life & Equity Assurance		Norwich Union Assurance Co. Ltd.		Slater Walker Insurance Co. Ltd.	
Churchill Bldg. E.C.4. 01-30-0111		Ringside House, 4, White Horse Road, Croydon, SURREY		7, Old Park Lane, London, W.1.		1 Olympia Wy., Wembley, Mids. HA9 9NH		PO Box 4, Norwich NR1 3NG.		30, Utteridge Rd. W12.	
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FINANCIAL TIMES SURVEY

Monday July 14 1975

SUDAN

Politically settled, but with a poor economic record, Sudan is beginning to realise some of its undoubted potential. There is no shortage of funds for development—the problem is still how to put them to good use.

Turning hopes into reality

SUDAN, say the cynics, is a country which has always lived on its potential. Since independence in 1956 it has attracted the political and economic attentions of almost every possible world power bloc, and has yielded to them, on the whole, a disappointing return of political instability and low or even negative economic growth. Sudan may still be living on its potential, but its potential is far closer to being realised than it ever has been before.

It appears at last to have found a political system which works reasonably well and confers a fair degree of stability. It has settled the problem of the south after seventeen years of intermittent civil war, and in so doing has acquired both a greater sense of national identity and a credible role on the world stage, as a country with a foot in both the Arab and African camps. It is at last in the first phase of tackling its crucial infrastructural and development problems, and it can reasonably hope to receive much more money from the Arab world than the generous

contributions it has already had. The architect of Sudan's present hopeful state of affairs is the somewhat unlikely figure of its President, Jafar Mohammed Nimairi, an energetic soldier who came to power in a military coup in May, 1969. The military take-over came after a period of deep instability in which Sudan experienced the disadvantages both of a transplanted system of Westminster Parliamentary Government and, under a previous set of military rulers, army government. But it has not been plain sailing from that date.

The May Revolution, as it is now called, was followed by a violent flirtation with the Soviet Union and Eastern Europe. Military and economic aid was sought and, usually in disappointing quantities, supplied; a harsh policy of nationalisation and sequestration of private businesses and the property of political opponents was pursued at home. The regime identified itself closely with the more extreme members of the Arab community and thus forfeited the friendship of the more moderate countries which could have been more use to it.

The game was up remarkably quickly. The total demoralisation of the remaining private sector and the gross inefficiency of the bureaucratic management of the nationalised concerns led to a crisis as both Government revenues and foreign reserves drained away: the crunch came in an attempted Communist coup in July, 1971, during which Nimairi lost power for 72 hours but regained it in an army counter-coup. With the help of President Khedafi of Libya who forced down a BOAC VC-10 carrying

two coup leaders who were later sent to Khartoum and executed.

Assault

The attempted coup, in which 28 pro-Nimairi soldiers were massacred, led to a savage assault on the Communists in Sudan, a purge of left wingers in the Government, and an abrupt volte face regarding the USSR, to whom Nimairi was almost gratuitously rude. It also led to a gradual reversal of the economic policies which had proved so unsuccessful. Some industries were gradually denationalised. Now President Nimairi holds power by virtue of the army but has gone some way towards giving the regime a broader base by establishing a political party, the Sudan Socialist Union (SSU), and a National Assembly, which are discussed elsewhere.

The economic crisis was one reason why President Nimairi stepped up efforts to reach peace in the south, and in 1972 a political settlement was reached in the Addis Ababa agreement. It was a highly significant turning point in Sudan's development. The problem of the south, the result of a century or more of misguided policies, had proved intractable both to political cajolery and to military action, but by 1972 both sides were aware of the futility of the struggle, which was a block on almost all economic development in the south. Under the Addis Ababa agreement the three southern provinces of Equatoria, Bahr El Ghazal and Upper Nile, covering about a quarter of the country's total area, were given regional semi-autonomy based

on the southern capital of Juba. A massive aid programme began to rehabilitate more than 1m. refugees who had fled to neighbouring countries.

The policy of reconciliation which followed is probably President Nimairi's greatest achievement to date and one which is greatly to the credit of the Sudanese people. The that brings in assistance from experience of Nigeria and the outside. If there is dis-

This Survey was written by
James Buxton of our Foreign Staff

Biafra has shown that reconciliation can come astonishingly fast despite or perhaps because of a bitterly fought war, but President Nimairi's own acts of magnanimity accelerated the process. It is symbolised by the fact that General Joseph Lagu, leader of the Anya-Nya guerrillas during the final years of the war, is now in charge of the army's southern command in Juba.

The people of northern Sudan are grateful for the increased self-respect that the ending of the war has given Sudan, but there is resentment in many quarters at the heavy cost of subsidising the south. After 17 years of war it is not surprising that the south was almost without any infrastructure and means of production, and it is wholly understandable that the south has so far been able to make only a tiny contribution to its own subsistence, as a separate article explains. But this is not always understood in the north, whose own need for infrastructural investment is

acute by the standards of most countries and where there are areas in as desperate need as the south.

The south, meanwhile, is delighted with President Nimairi and realises that he offers the best hope for its future development by ensuring the flow of money from the central Government and the stability of the Sudanese people. The that brings in assistance from experience of Nigeria and the outside. If there is dis-

benefit to Africa. Sudan is a member of the 12-nation OAU committee negotiating with 12 Arab League States over oil prices and assistance and is useful in these discussions since it can see the African point of view and yet has ties with the Arab oil producers.

Dispute

The Sudanese role in the dispute between Ethiopia and Eritrea is a good example of the kind of policy initiative which President Nimairi likes to take. Sudan has been trying to get the two sides to the conference table, counselling moderation to the Ethiopian Government and trying to use its contacts with the Arab countries to impress on them the importance of the African principle that territorial integrity should be respected. But in the dispute Sudan's role is necessarily complicated by the fact that it has long accommodated Ethiopian and Eritrean refugees, and has difficulty in controlling movements along the wild frontier with Eritrea. But it is thought that the Eritrean Liberation Front now obtains most of its arms from South Yemen.

Since 1971 President Nimairi has turned his attentions both to the west and to China, as opposed to the Soviet Union and the eastern bloc (except Yugoslavia and Romania). Relations with Britain have improved steadily since £12m. compensation was paid for British companies nationalised in 1970, and Britain is now an important aid donor and is looked on as a friend whose advice, based on years of experience in Sudan, is considered worth taking. It was

probably at least partly because of gratitude to Britain that President Nimairi sent a senior minister to Kampala recently to try to intercede with President Amin for the life of Mr. Hills, the British lecturer.

Relations with other European countries, especially West Germany and Italy, are good, with aid flowing, and Sudan recently became an associate member of the EEC. The improving relationship with the U.S. took a knock after President Nimairi released the convicted Black September guerrillas who murdered the U.S. ambassador in Khartoum in 1973, but relations are now mellowing again: the U.S. appears to think it has made its point with Sudan and is again allowing the Export-Import Bank to finance trade deals. China is popular in Sudan as a supplier of military equipment and development assistance in large sums: £530m. interest-free with little Sudanese co-operation required.

But it is the Arab world which is the natural focus of Sudan's interest, even though southern considerations tempered its earlier desire to unite with Egypt and Libya. Plans for closer economic links with Egypt are going ahead. Sudan is strongly committed to the Palestinian cause but in practice is not required to do much more than make the right noises about it. It claims that its southern settlement was a major influence in ending Israeli influence in Africa and turning the African states towards the Arabs. Israel previously backed the Anya-Nya. An agreement over the exploration of mineral rights under the

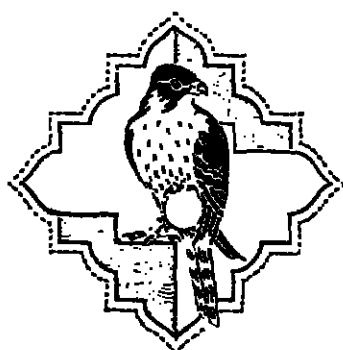
BASIC STATISTICS	
Area	967,000 sq. miles
Population (1973 census)	14.5m.
GDP (1973/74)	£569m.
Per capita	£37
TRADE (1973-74, JULY-JUNE)	
Imports	£514.4m.
Exports	£514.3m.
Imports from U.K.	£58.2m.
Exports to U.K.	£55.2m.
TRADE (1974-75, JULY-MARCH)	
Imports	£520.5m.
Exports	£512.1m.

Currency: Sudan £
£1=£58.837

world is principally aimed, as the Foreign Minister, Mr. Jamal Mohammed Ahmed, admitted to me, towards getting as much financial aid as possible. In recent years Kuwait has been the biggest single investor in Sudan, both with private and state finance. But the emphasis is now switching from Kuwait and the other Gulf states towards Saudi Arabia.

Under the late King Faisal Saudi Arabia was always wary of President Nimairi's ideology and even maintained a policy of flattering the emigres from Sudan who were affiliated to the right-wing opposition groups. Until recently Saudi help for Sudan was principally confined to guaranteeing the \$200m. Eurodollar loan which Saudi financier Adnan Khashoggi arranged for Sudan last year. But since King Faisal's death Saudi Arabia appears to have changed its policy about Sudan. An agreement over the exploration of mineral rights under the

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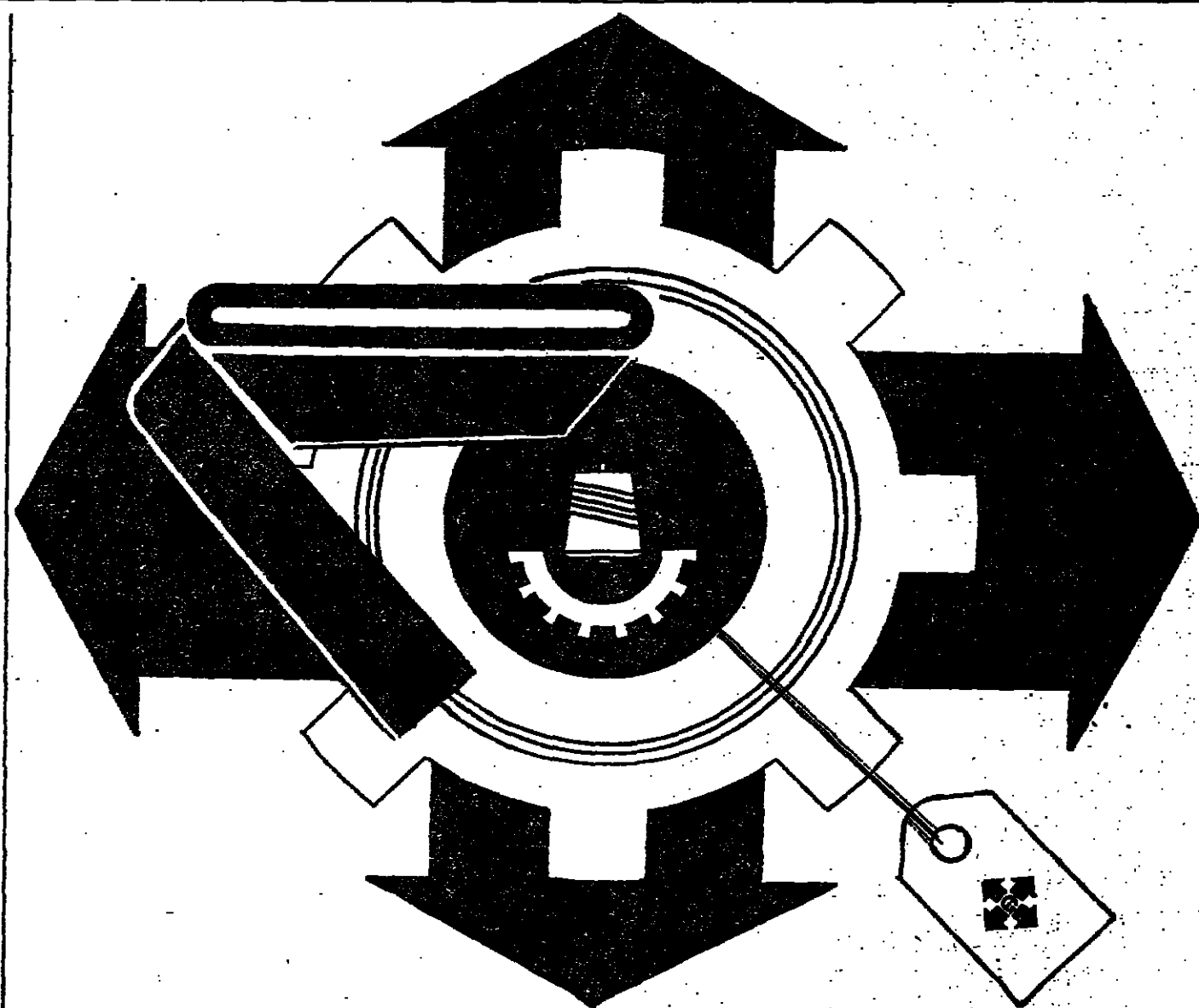
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SUDAN II

Changing economic pattern

THE SUDANESE Government is engaged in a vigorous effort to get the economy out of a long-term vicious circle of low growth. The policy has so far caused a serious short-term economic situation, but there is a good chance of its succeeding over the next three to four years and paving the way to sustained growth for a country whose economic potential has often been heralded, but never more than partially realised.

The basic facts about the Sudanese economy are depressing. In 1973-74 (the financial year runs from July to June) Sudan had a GDP at current prices of \$3,698m., a 5 per cent improvement on the year before. But taking into account the rate of inflation one is forced to conclude that there was probably little or no real growth in these years. It is generally considered that the same conditions, or worse, prevailed throughout the 1960s, but there may have been a small amount of real growth in the past 12 months.

Even if there was real GDP growth, any potential growth in GDP per head was almost certainly offset by the rise in population, which has been put at 2.5 to 3 per cent a year. But the exact population figure for the whole country is uncertain: the 1973 census put it at 14.9m. for that year, but estimates based on previous censuses put

it at more than 17m. for this year.

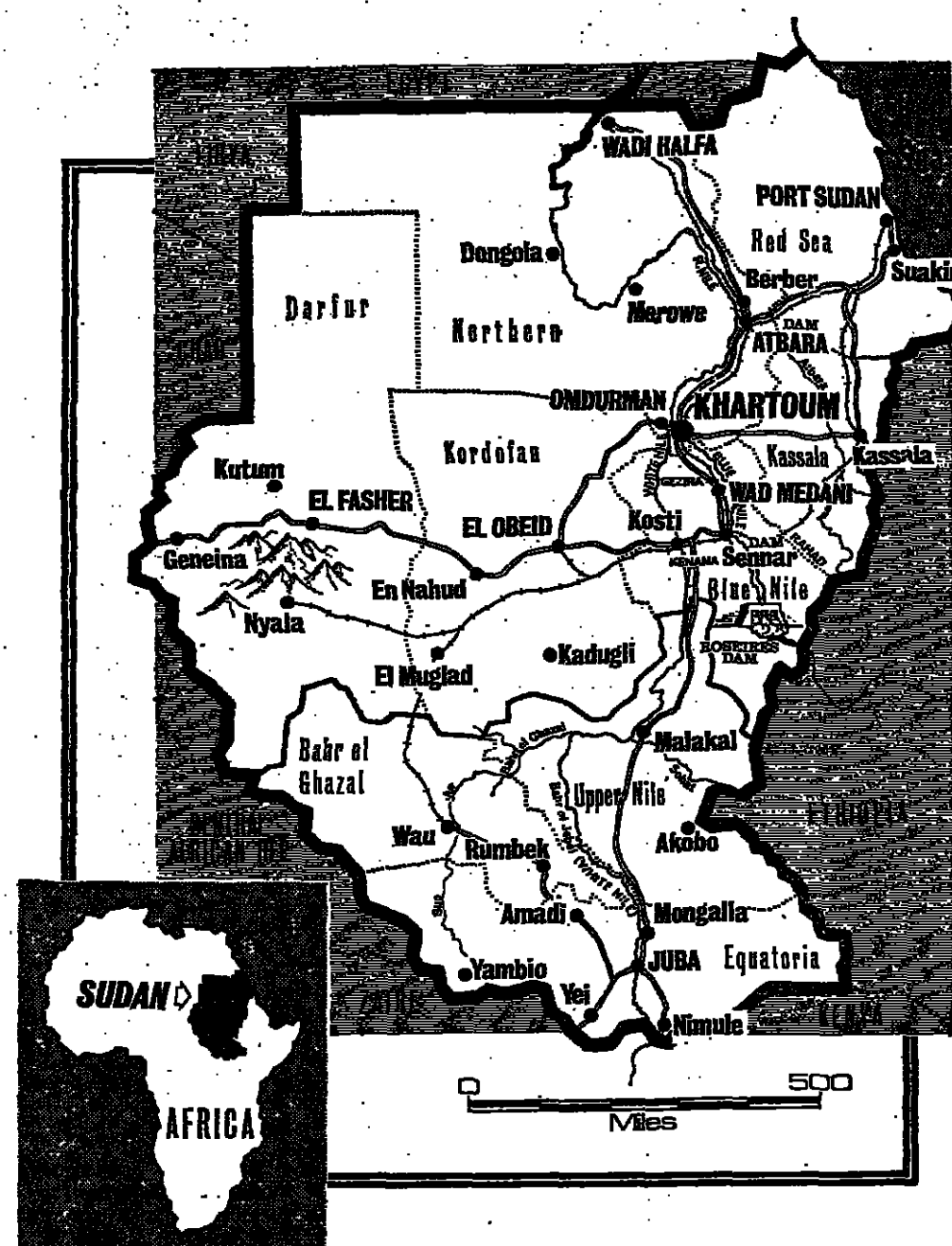
Sudan's dismal growth record is the result of the failure of agriculture to expand its output of cash crops and food to keep pace with the need for foreign exchange required to import capital goods and service the loans needed to generate economic growth. This is partly because of hitherto inadequate investment in agriculture, and still existing organisational inadequacies and poor overall infrastructure. Over the past few years about a quarter of Sudan's imports have consisted of food imports, a fact which President Nimeiri once called a "national disgrace".

Imports have usually slightly outstripped exports overall, and there has usually been a fairly big deficit on the balance of payments current account. The Government has not always been able to finance all its expenditure out of revenue, so has borrowed internally, increasing the money supply without a corresponding amount of growth, and thus increasing inflation. Sudan has been tragically unable to pull itself up by its bootstraps.

But the country is now in the throes of a massive change in an attempt to break out of the no-growth cycle. The immediate result of this courageous policy has been to cause a general economic crisis: a rate of inflation of between 20 and 25 per cent, massive congestion on the infrastructure and severe balance of payments problems.

The new policy dates from 1973 when the (then) Finance Minister, Mr. Ibrahim Moneim Mansour, announced that Sudan was sick of the shackles imposed by world monetary bodies and said that Sudan would attempt to get as much development money as it could, if necessary on commercial terms in the market. This move coincided with the rise in oil prices, which made some of the Arab states better able to lend to Sudan.

Sudan's external debt increased dramatically. The figures for 1971, 1972 and 1973



are \$590m., \$1,032m. and \$1,111m., respectively. The figure for 1974 is \$2,277m. and by March this year stood at \$2,772m. The amount the Government spent on development stagnated around \$30m. a year between 1969-70 and 1972-73, but rose to \$50m. in 1973-74 and will probably top \$100m. for 1974-75.

The strain on the infrastructure has been correspondingly large. The productive areas of Sudan are almost all several hundred miles from the Red Sea, and the main link between them is the Sudan Railway system. Suffering like other narrow gauge railways from slow speeds, Sudan Railways has not been helped by lack of investment, inferior equipment, lack of executive capacity, labour troubles and the tendency of the track to be washed out in the rains.

Trouble

The increased imports that Sudan is now buying have simply been too much for Sudan Railways, and it also has trouble transporting Sudan's vital cotton exports. This has led to a switch of goods to road transport. There are only about 300 miles of asphalted roads in the whole country, on the vital link across the virtual desert between Port Sudan and Khartoum the "road" is a set of ruts, which in places may be 10 to 20 miles wide, but this does not deter trucks from making the journey, taking up to five days on it. Meanwhile there is great congestion at the only port, Port Sudan, as much because there is great difficulty in getting goods away from the docks because of a general shortage of transport, as because of the shortage of berths.

Relief, however, is on the way. With the help of a variety of aid donors, including Britain, a road network connecting Port Sudan, Khartoum and the rich agricultural area to the south of Khartoum is being stitched together and should be more or less complete by 1977-78. At the same time a pipeline is being built from Port Sudan to Khartoum. Both these things will take some of the strain off the railways, which are also to get 50 new locomotives and 325

wagons, as well as passenger of the balance of payments figures, the grim prospect for to improve the river services, payments in the future and the upgrade the airports and disorder in Government finances were among the factors bringing about a major Government reshuffle at the end of January this year. Mr. Mansour was replaced by the more orthodox Mr. Mamoun Behairi, a former president of the African Development Bank.

In invisibles the payments have gradually mounted, largely because of interest payments, and for the first nine months of 1974-75 Sudan had a net invisible deficit of \$24.7m., so that the total current account deficit at the end of March was \$212m., compared with a deficit of \$30.5m. for 1973-74. The ratio of debt servicing and repayments to exports is now thought to be about 3:10 and promises to remain so on average for several years to come, possibly peaking higher. Foreign exchange reserves stood at \$232.9m. at the end of March. At that time Sudan, which has always been punctilious in servicing its loans, bought 18m. intake SDRs from the IMF. The frightening implications

Mr. Behairi's budget for the coming year appears realistic, although it was disappointingly obscure on several points. Although the Government has development projects in the pipeline worth about \$250m. or more, it does not believe that the country can either afford or absorb more than \$5130m. worth during the current year. A new policy for borrowing is presumably being formulated, concentrating on getting soft loans related to specific projects. A good start may have been made recently when Mr. Behairi got a loan of \$28m. from Saudi Arabia to finance part of the Rahad irrigation scheme, but the terms of the loan have not been revealed.

But until Sudan can generate the internal resources to meet its loan commitments, its crying need is for short-term balance of payments support, preferably in the form of grants.

Promising

However, the development schemes in the pipeline look promising: the infrastructure is being improved; and other economic policies initiated by the Government since 1971 are beginning to pay off. Food production is growing fast and self-sufficiency is not far off. Denationalisation has improved the business climate and raised efficiency. The State trading corporations, a constant drain on the exchequer, have been severely warned that they cannot keep running up deficits, and there are even hints that some of them might be returned to the private sector.

Finally, the recent reopening of the Suez Canal is a good boost for Sudan: it will speed up and may even cheapen the supply of imports, since in the past seven years tramp ships have rarely visited Port Sudan. (In the short term, however, it will probably only add to congestion.) Also, Sudan, has, this year, become an associate member of the EEC. This will mean price support in exports of sugar, groundnuts and hides and skins to the EEC, as well as the chance of extra aid.



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Hopes

CONTINUED FROM PREVIOUS PAGE

Red Sea has been signed, Saudi Arabia has said it will finance a deal whereby Sudan replaces some of the worn-out Soviet military transport equipment from somewhere in the West, and, most recently, it has lent Sudan \$28m. for the Rahad irrigation project.

There is growing optimism in Sudan that Saudi Arabia may, probably through some Arab financial institution, put up much of the vast amount of money that would be needed if Sudan were to be turned into the breadbasket of the Middle East. This would involve developing

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SUDAN III

Political scene settles down

THE SIX years of President Nimeiri's rule have been no less eventful than the earlier years of Sudan's history since independence, but since the attempted Communist coup of July 1971 a political seismograph would have registered a dwindling number of tremors. From that date onwards there have been fewer and fewer direct assaults on the regime, and in consequence its self-confidence has increased.

In the past changes of regime in Sudan have been brought about either by massive demonstrations of popular feeling (such as topped the Aboudi military regime in 1964) or, more typically, by army intervention. The Nimeiri regime has survived because it has not offended enough politically conscious people who could unite against it, and because it has satisfied the requirements of the army.

Survival

The armed forces number about 37,000, almost all of them in the army itself. The army, which brought Nimeiri to power in 1969, is the sine qua non of the regime's survival. Sudan does not have an overtly military government—there are very few soldiers to be seen and senior military men hold relatively few important posts in the establishment—but there is little doubt that if the army became discontented with the regime it would change it. At the moment the word from the army, so far as its views can be assessed, appears to be that it wants the present regime to continue.

It is not difficult to see why President Nimeiri's regime may not yet have produced startling economic triumphs but it has probably been more effective than any other regime since independence and shows a good chance of delivering the goods. From the army's point of view it has brought political stability and has averted the need of the military to intervene in politics. The regime has developed a political system which the army

being largely left out of Sudan's development plans, and that the central planners might come to forget what the south can produce. The south could very well be a different country. With an area of some 250,000 square miles (a fourth of Sudan's total area) and a population of 2.8m. (according to the 1973 census) it is bigger than many African countries. Its Government has wide powers in nearly every field except defence, external affairs and overall economic planning. Above all, it would probably be possible, on the basis of reading Sudan Government publications and the reports of many consultants on the country's economy, to be almost unaware that the south exists.

When the war ended it was inevitable that promises and predictions should be made: by the central Government, by the new regional government, by foreign governments and agencies who offered help on a generous scale. Judged against those promises and predictions (self-sufficiency by 1976 was one of them) southern Sudan is a failure. Judged against what could realistically be expected in three years after 17 years of war South Sudan has done pretty well.

Its greatest achievement to date has probably been the resettling of more than 1m. refugees who flooded back from Kenya, Uganda, Central Africa and Ethiopia. Only about 30,000 now remain in Uganda, where many are in President Amin's army or administration. The rest have, with the help of UN and other relief agencies, been accommodated in or near their original villages, or in the three main towns, Juba, Malakal and Wau.

The resettlement took about two years and is now effectively over. Alongside it went a drive to absorb about 25,000 former Anya-Nya members. Of these 6,000 were taken into the army, and 6,000 into civil occupations. The danger is that this

attempting to stimulate rural development by undertaking projects like well drilling and building on a community basis. But with a total budget of only £51.6m. ("a paltry sum" as a senior official described it to me), its effectiveness in this field must be limited, and it is by no means certain that the people of the provinces are, as the SSU claims, turning to the party rather than the administration when they want to get things done.

Link

Its latest move is to appoint senior Government ministers as "supervisors" of particular provinces—the Finance Minister, Mr. Mamoun Behairi, has, for example, been made supervisor of South Kordofan province in the west. The idea is partly to give the provinces a direct link to the central Government, and partly to increase devolution. The ultimate idea is almost utopian: senior central Government figures, says the SSU, will eventually be transferred to the provinces to do their supervision in person, while their place at the centre will be taken by less important people. The provinces would get more autonomy and the SSU Political Bureau would gain in strength at the expense of the Council of Ministers and civil service.

For the moment, though, the SSU, despite claiming 2m. members, is far from being the "soul of the Sudanese people" as it aims to become. Its members include some reformed members of the Communist Party, but it has not been able to absorb the right-wing Ansars who, under the banner of the National Front, tried to stage a coup in 1973—the last serious attempt to topple the regime. Though President Nimeiri has denounced the

shelks and traditional rulers, and to insinuate itself into the administration by making the provincial commissioners or governors SSU secretaries or generals as well. It is also militant to the regime.

Yet the President appears reluctant to go any further in broadening the political base of the regime. His own power is increasing: he takes many of the economic decisions and most of the foreign-policy initiatives himself, and insists that people both at the top level and the bottom do their jobs properly, enforcing this with a habit of making lightning visits to the provinces. The reshuffle of January 31 this year, in which several Ministers were sacked or changed positions and which altered the hierarchy of the SSU, showed that the President was in charge and that his Ministers were very much his servants. He humbled some of the mighty and exalted some of the weak.

President Nimeiri is an honest and warm-hearted man who is not afraid to apologise for past mistakes or to reverse his policies overnight. His political skills have gradually increased with experience. Yet he remains a man who is respected rather than loved. "Rather like Edward Heath in Britain," one foreign observer told me. A significant element in his support in the crises the regime has gone through since 1972 has been that of the south, which regards President Nimeiri as its principal benefactor. If tribal difficulties or frustration at slow development brought trouble in the south it could mean trouble for President Nimeiri. Another potential threat to the regime would be a link between a faction of the SSU and some influential army officers. But as far as one can be sure there is no sign of this.

President Nimeiri's own health is a potential risk to his continuing in power. He suffers from high blood pressure, and when he returned recently from two weeks in Europe it was announced that he was in perfect health, but that he had been advised to "divide his time between work and regular intervals for rest." For a man who sleeps little and works incessantly that may be a tall order.

South remains a world apart

THE 750-mile flight from Khartoum to Juba, the capital of the semi-autonomous southern region, takes three hours in a turbo-prop Fokker Friendship and seems like a journey to a completely different country.

One leaves behind the desert that surrounds Khartoum and lands in the lush vegetation and humid atmosphere of tropical Africa, only about 100 miles from the borders of Zaïre and Uganda and not much further from Kenya.

The south could very well be a different country. With an area of some 250,000 square miles (a fourth of Sudan's total area) and a population of 2.8m. (according to the 1973 census) it is bigger than many African countries. Its Government has wide powers in nearly every field except defence, external affairs and overall economic planning. Above all, it would probably be possible, on the basis of reading Sudan Government publications and the reports of many consultants on the country's economy, to be almost unaware that the south exists.

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went back to farming. However, a fair proportion of those taken into government have had to be laid off, since they were usually untrained and presented a massive burden to the already overstretched regional government finances.

Among the south's other achievements have been the setting up of a regional administrative structure with a rudimentary civil service, a regional High Executive Council under the lawyer Mr. Abel Alier, who is also vice-president of Sudan, and the election of an eager if vociferous People's Regional Assembly which represents at least one medium by which the Government can communicate with the people.

The regional Government has made a start in setting up small agricultural schemes to get food production going. It has begun planting cash crops such as coffee which will come to fruition over the next few years. It has laid the basis of a fisheries industry and a live stock improvement scheme, and has built roads and had bridges constructed; started handicrafts industries; and, with the help of the central Government, seen of industrial projects, such as a brewery at Wau and the sugar plant at Malut start to get under way.

There are two main reasons why it has not been able to do more in effecting its fairly well thought-out schemes for self-sufficiency in food production, for cash crop production and for forestry development, and why achievements in other fields, like education, have fallen so far behind expectations. The first is transport. The south is a vast region, ironstone plateau surrounding the Sudd swamps in which the White Nile, the main artery of the south, almost gets lost. There is a certain amount of river transport, relying on a fleet of about 80 Nile steamers, but the journey upstream from Juba, can take up to two weeks. Land transport in Bahr El Jebel is reasonably good because its capital, Wau, is a railhead. In Equatoria province, which stretches right across the south, the foreign exchange land is suitable for building the central Government.

roads and these roads are now reasonably good. But in Upper Nile the swampy nature of the ground means that the roads are only passable for about half the year, and in none of the provinces are there nearly enough rural roads. These are a very serious shortage of trucks and other vehicles, and what trucks there are are often too heavy for the existing roads, which shortens their life.

Transport

Poor transport is close to the root of almost every problem in the south. It largely explains why there is often no petrol for what vehicles there are. It partially explains why the regional government last year was able to collect only £51.52m. out of its projected local revenue of £54.7m. It helps explain why rural development schemes have been so slow in getting going and why farmers are reluctant to grow crops for a subsistence since they can see has built roads and had bridges constructed; started handicrafts industries; and, with the help of the central Government, seen of industrial projects, such as a brewery at Wau and the sugar plant at Malut start to get under way.

In the wider context, the transport problem is a magnification of a problem which affects the whole of Sudan. Capital goods for big projects usually have to come all the way from Port Sudan, through a crowded and over-railways that the south cannot cope. Often goods take up to six months to reach the south from the Red Sea; sometimes they are diverted en route. The south's need for making greater use of the closer port of Mombasa in Kenya, and if the south had access to the foreign exchange it needs to avoid buying through the central Government.

CONTINUED ON NEXT PAGE

No lack of finance for development

WHATEVER else critics of the Sudanese economy may say they cannot claim that it is short of development finance. At the end of March the country's outstanding debts, including short term finance, was \$272.5m., more than twice the figure at which it stood a year before. In addition it had an undisputed balance of external assets amounting to \$3150.8m. Since then firm commitments of extra finance have come from several sources, including both Kuwait and Saudi Arabia, and here are vague commitments amounting into hundreds of millions of dollars from Iraq and the United Arab Emirates.

On the basis of the March 31 figures, Sudan's largest creditor is Kuwait, with loans totalling \$55.8m. committed and a great deal more in the pipeline. Some of this is relatively short term financing, but it also includes sums provided by different Kuwait investment institutions or such projects as the State-owned Sennar sugar scheme and the Rahad irrigation scheme, to which the Kuwait Fund for Arab Economic Development has decided to increase its contribution from \$11m. to \$50m. Kuwait has long had a substantial stake in the private sector of the Sudanese economy. One of the biggest companies operating in Sudan is Gulf International, which has a 5 per cent stake in the Kenana sugar project, and big textile interests. Other Kuwaiti interests are represented in Kenana, partly through the Arab Investment Company and partly through Lonrho itself.

Loans

Abu Dhabi has committed \$24m. to the building of the Port Sudan-Suakin road and has also made some cash loans, as has Qatar. Hitherto Saudi Arabia has not been a major benefactor of Sudan, largely for political reasons, but it is now thought that following a re-appraisal of its relations with Sudan it may provide the large sums needed to make the country a much bigger food producer. If so, it would probably channel them through an agency such as the Kuwait-based Arab Fund for Economic and Social Development, which has just completed a report on Sudan's development potential. Mr. Mamoun Behairi, the Finance Minister, said in his budget that it would probably be the basis for Sudan's future planning. But the vital question is on what terms Saudi Arabia and other Arab countries will lend to Sudan, since in the past much of the financing, especially from Kuwait, has been on stringent terms.

Sudan's total outstanding debt to the Arab world stood at \$316.5m. at the end of March. This compares with a debt of \$876.4m. to various international agencies. Apart from a debt of \$541.9m. drawn on the IMF, both the World Bank and the IDA are heavily committed to the Sudanese economy, both in infrastructural investment and in agriculture. Sudan owes about \$525m. to East European countries and China and Iran, SDC is an arm of the Govern-



Building work in progress on a new road between Wad Medani and Gedaref.

ment the U.S. and Western European countries are owed \$554.6m.

This last figure includes the drawings to date on what are probably the two most controversial items in Sudan's development financing, the \$200m. Eurodollar loan, guaranteed by Saudi Arabia, and a \$20m. loan organised by First Chicago and the Union des Banques Arabes et Françaises at the Sudan Government's instigation. The \$200m. loan has a maturity of 10 years and interest rate of 10 per cent above the London dollar rate, while the \$20m. loan is for seven years at 14 per cent above London.

The \$200m. loan has been made the equity capital of the Sudan Development Corporation (SDC) which has been specially set up and it will pay the Government a dividend in due course. The Government has the task of servicing the loan. In three years' time when repayments have begun it will have to find about \$25m. a year in foreign exchange, so that with interest payments the loan could be costing Sudan \$40m. a year by the end of the decade.

The SDC, now a focus of the attention of many potential investors in Sudan, has so far committed \$45m. of its capital. It is meeting part of the foreign exchange costs of one Government sugar scheme and of six textile mills, and it is buying 10 per cent of the equity of Kenana. But the two biggest sums SDC has disbursed are two loans totalling \$15.3m. to finance deals to buy badly needed locomotives and rolling stock for the railways over five to seven years, and a loan of \$37m. to the Bank of Sudan to finance some of the Government's foreign exchange commitments. It is easy to criticise the SDC's devotion of years 1970-75 turned out to be unsuitable, but the plan period was extended for a further two years during which some clear policy objectives have been defined. These include increasing

cash crop production in agriculture and attaining self sufficiency in food production, both of which are on the way to being fulfilled.

The Kenana project, with its big outside equity participation and its management by Lonrho, is a clear message to potential investors that Sudan's approach to development is essentially pragmatic. Another newly announced scheme, to build a cement plant near Port Sudan, is to be financed largely with U.S. and Saudi finance, with possibly only a small Sudanese contribution. It will cost \$40m. and part of the backing should come from Triad, the organisation of the Saudi financier Adnan Khashoggi. The cement plant will use only local materials—Red Sea coral for calcium, and iron ore, silica, alumina and gypsum which have been found close to the site.

Potential

These discoveries have cast new light on Sudan's mineral potential, previously not highly regarded. Meanwhile the U.S. company Chevron is exploring the Red Sea area for gas and oil, and a small gas strike was made last year which raised hopes although gas was not in commercial quantities. In the south of Sudan the British company, Hunting Geology and Geophysics, is making an aeromagnetic survey and using aerial photography and satellite mapping as a preliminary to oil exploration in a 200,000 square mile area.

If Sudan appears to be eclectic in the sources and types of finance it makes use of it should not be thought that development is on a hand-to-mouth basis. A national plan drawn up by Soviet experts for the years 1970-75 turned out to be unsuitable, but the plan period was extended for a further two years during which some clear policy objectives have been defined. These include increasing

cases, have more experienced management.

Sudan suffers from many of the infrastructural problems one would expect in a developing country. The bureaucracy is not always efficient and its functions are split among a plethora of ministries and agencies. The education system has serious imbalances. There are not enough places in higher education for those who qualify for it, and 80 per cent of higher education is concentrated on arts as opposed to technology, which shows little relevance to present, let alone future, needs. Many Sudanese are almost too highly-educated for the opportunities in the country, while the majority are hardly educated at all.

Ambitious

Dr. Mansour Khalid, the former Foreign Minister who is now Minister of Education, is embarking on an ambitious plan to transform Sudanese education, which it is hoped will, over the next ten years, lead to it producing 65 per cent. technical graduates. Dr. Khalid would like the national salary structure to reward technologists as highly as or better than arts graduates.

Apart from educational problems Sudan has manpower difficulties. There is a drain of skilled craftsmen to Libya and Saudi Arabia, both of which pay highly for trained construction workers. There are frequent labour shortages on the Gezira in harvest time which have to be made up with immigrants from other African countries such as Nigeria. On the other hand the drift to the towns, especially Khartoum and Omdurman, has produced a level of urban unemployment put at 15 or 20 per cent.

Many Sudanese feel that there is less resistance to economic change than might be expected, if only because the standard of living has been so low for so long. The view has been expressed that the danger is the other way: that the Sudanese are becoming obsessed with development. Dr. Khalid feels that there is a possibility that people will think talking about development is a substitute for the real thing. "Development mustn't just become another slogan," he says. "The successful government is the government which puts a limit to people's hopes."

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GUNEID SUGAR FACTORY

The Guneid Scheme is located about 120 km south of Khartoum on the east bank of the Blue Nile River.

The gross area for cane growing is about 37,000 acres and the factory capacity is 4,000 T.C.D. for a yearly sugar production of 60,000 tons.

The factory was supplied on a turn-key basis from a German consortium, Backau Wolf and B.M.A.

Sugar production since 1969-70 has been as follows:

SEASON	AREA FED.*	SUGAR TONS	CANE TONS
69/70	11698	18,460	202375
70/71	13005	37,080	337512
71/72	12953	28,470	230739
72/73	17813.5	42,329	399919
73/74	16631	45,267	409843

KHASHM II GIRBA SUGAR FACTORY

The Girba sugar scheme is located east of Khartoum on the west bank of Atbara River.

Girba is a replica factory to Guneid with 4,000 T.C.D. capacity and yearly production of 60,000 tons of sugar. The gross area for cane growing is about 46,700 acres.

The gross area of the sugar scheme is 40,000 acres.

Production of sugar since 1969-70 has been as follows:

SEASON	AREA FED.*	SUGAR TONS	CANE TONS
69/70	17210	56,857	623353
70/71	14067	35,503	322931
71/72	17169	62,905	646269
72/73	17052	70,568	697746
73/74	19292	75,704	737627

The Girba factory has a great advantage over Guneid in respect of the system of tenancy. Cane is grown by direct labour and the land is the property of the factory. Also, the system of irrigation and canalization was designed to suit sugar cane fields.

NEW SUGAR FACTORIES UNDER CONSTRUCTION

1. N.W. Sennar Factory

Sugar Scheme is located about 300 km. south of Khartoum, on the west bank of the Blue Nile River.

The gross area of the scheme is about 33,000 acres. The factory is designed to crush 6,500 T.C.D. Erection started in January 1974 and will finish in December 1975. The factory is designed to start production in the season 1975/76, with a trial season of 50,000 tons of sugar.

The factory is supplied and erected by Fletcher and Stewart of England. It is expected to produce about 110,000 tons of sugar per annum.

2. Assalaya Factory

The Assalaya factory scheme is located about 65 km. west of Sennar, on the east bank of the White Nile River.

The gross area for cane growing is about 30,000 acres. Assalaya is a replica of the N.W. Sennar factory, with a capacity of 6,500 T.C.D. to produce about 110,000 tons of sugar annually. The factory is supplied and erected by Fletcher and Stewart.

The Assalaya factory is scheduled to start production in April 1977 (season 1976/77).

3. Melut Sugar Scheme

The Melut scheme is located on the White Nile River. The gross area of the scheme is about 40,000 acres. The factory will have a capacity of 6,500 T.C.D. to produce about 110,000 tons of sugar annually. The crushing will start in the season 1977/78.

The factory will be supplied by U.C.M.A.S. of Belgium.

MONGALLA SUGAR SCHEME

Located about 50 km. north of Juba on the White Nile River.

The Mongalla sugar scheme is expected to produce about 50,000 tons of sugar per annum to meet local consumption. The gross area of the scheme is about 30,000 acres.

The factory required will be of 2,250 T.C.D.

* 1 Feddan = 1,038 acre

† Tons of Cane per Day

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South

CONTINUED FROM PREVIOUS PAGE

The other main problem in the south is the acute shortage of trained staff. In the Ministry of Agriculture only about half the posts are filled. Lack of good administrators (inevitable after 17 years of near chaos), bureaucratic congestion and inefficiency are among the reasons why the regional government in the last financial year was able to spend only 15 per cent of its development budget of £57.1m. Only 15.5 per cent of the agricultural development budget of £1.1m. was spent, and little over 5 per cent of both the education and communications development budgets. In the face of facts like these it is good to report that the spirits of civil servants in Juba are remarkably high.

For the new financial year which has just begun about the same amount as last year is being devoted to development, while direct central Government investment and contributions by outside agencies make a total development budget of over £30m. (Last year development agencies are thought to have spent about £17m.). Current expenditure is budgeted at £20.7m., of which £15m. should come from the central Government and £5.7m. should (hopefully) be raised locally. The southern government has complained that the central Government is often slow in paying its contribution, which has led to the south's inability

to find the cash for specific needs like paying school teachers.

So far development spending in the south has been on a piecemeal, year-to-year basis, and it will take a good deal of organisation before the regional government can produce a coherent development scheme, which it can press the central Government to include in its national planning. In the long term the south has great development potential. The soil is mostly fertile and the basic crop, sorghum, is rich in vitamins. Coffee and tea are being grown and there is greater scope for sugar than the one or two schemes now planned. The forestry potential is enormous and could save Sudan expensive imports. But it is difficult to quantify the potential because of the sheer lack of information on the south and it will be difficult to realise it if the present constraints are not eased, of which there is no immediate prospect.

Skilled

Often it is dishearteningly hard to see how the south can pull itself up by its bootstraps: for example the potential in cattle production is great since there are big herds and skilled herdsmen. Eradication of most diseases would have to precede large scale marketing, but how

can a farmer outside the cash economy be persuaded to sell his cattle when there is nothing that he could possibly want to buy with the money he would get?

If the Jonglei canal is built it would save the south from flooding and could lead to the irrigation of more than 200,000 acres of land for crop production. The loss of cattle grazing land that this would represent would be made up by the subsequent draining of part of the Sudd. But there is no certainty that the Jonglei scheme will go ahead, though if it did it would provide a faster water transport link with Juba and good roads along its banks.

Absurd rumours that the canal would lead to the settling of millions of Egyptians in the south led to riots in Juba last October, which brought 200 arrests and caused the destruction of 60 precious vehicles. The riots were fairly obviously provoked by some group which did not feel properly represented in the southern establishment, hardly surprising in a region which has a few big tribes and a plethora of little ones. The riots were a stark reminder of two things: that slow or mismanaged development can cause trouble, and that if the north versus south problem is now dead, the south still has to face the perennial African problem of tribalism.



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SUDAN V

Agricultural wealth...

"NO ONE who has ever lived in the Sudan can escape the reflection what a useless possession is this land." General Gordon's bitter words may have seemed valid in the 1880s but they are now just a cliché to point out how wrong he was. Sudan's agricultural sector, which makes up about 40 per cent of GDP and employs about 80 per cent of the population, earned about \$511.5m. in foreign exchange in 1973-74. Its potential to increase vastly its output is endlessly being proclaimed.

Out of the estimated 625m. acres of land in Sudan, about 200m. acres are thought to be suitable for agriculture, either as arable land (about 120m. acres) or range land (about 80m. acres). However, only about 8 per cent of this area is actually farmed—a cultivated area of about 15m. to 17m. acres. Of this area only about 4m. acres are irrigated, with only about half of this area actually growing crops at any one time.

On this acreage Sudan produces its major export crops, of which the main one is cotton, which usually makes up about 65 to 70 per cent of the country's export earnings. The other main crops are gum arabic, of which Sudan is the world's single largest producer, and groundnuts and sesame, both sold for oil.

Cotton was first grown in Sudan in 1825 on the Gezira scheme, irrigated from the Blue Nile, but is now grown on a smaller scale in other areas. Over the past five years both acreage and production have remained fairly static, the former at around 12m. acres and the latter between 1m. and 1.2m. bales a year. Cotton in Sudan has suffered two major problems in recent years, described fully elsewhere in this Survey. There has been uncertainty as to whether to diversify from the traditional long staple cotton towards growing medium and short staple cotton, the latter being more saleable in the West, and there has been confusion over marketing.

During the nationalisation measures of 1970 cotton market. The corporation has faced many of the difficulties one might expect from a bureau-

cratic organisation operating in a field in which flexibility and speed of decision are vital, and in 1973-74, when cotton prices soared, Sudan largely missed the boat to the extent of perhaps \$25m. It carried over a large stock to the next year, during which prices sagged sharply, again failed to market its crop successfully, and this year has a carry-over of about 600,000 bales and an estimated crop of about 1.27m. bales. In 1973-74 Sudan earned \$571.8m. and between July, 1974, and March, 1975, earned \$544.1m. from cotton sales abroad.

Partly to avoid over-dependence on one crop, and partly to step up food production, 200,000 acres of the Gezira are to be planted with wheat during the coming season, and the acreage of medium staple will be increased by 200,000 acres at the expense of long staple, while short staple production will also be increased. Some reforms of the marketing system have been instituted, but it remains to be seen how successful Sudan is in disposing of its cotton this year.

Gum arabic, grown on acacia trees, has in the past contributed about 10 per cent of Sudan's export earnings but, as the Government admits in a recent report, has suffered an "acute decline" in the past five years. The 1973-74 total production of 22,000 tons was 38,000 tons less than the total production in 1967-68. The cause of this decline is thought to be a combination of adverse weather and poor marketing policies which has produced low returns, discouraging farmers from looking after their trees. There is no immediate sign of a revival on this front.

The two oilseed crops have shown reasonable increases in output in recent years and a crop of 800,000 tons is expected this year for groundnuts, while sesame output is expected to reach 300,000 tons.

Part of the Government's present agricultural strategy is to increase the output of export crops. The agricultural map of Sudan consists of a number of blocs representing irrigation or mechanised farming schemes concentrated in a few areas of the country, mostly around the confluence of the two Niles and their tributaries. It is on these areas that the Government's attention is concentrated, with almost nothing being devoted to improving the traditional agricultural sector by the process

of answers which are not so far forthcoming. But if the irrigable area is limited, there is immense scope for growing crops both on the rain-fed savannah lands and in the south. In the south infrastructural improvements could lead to much greater cultivation of sorghum, while in certain parts tea and coffee are being grown. The development of the south is discussed in a separate article.

On the savannah lands crops such as groundnuts, sorghum, soya, millet, and so on could be grown, given the building of a vast road system. Mechanised savannah farming, however, is very difficult, and the most successful examples of it in Africa are probably Kenya and Rhodesia. However, training for Sudanese would probably be forthcoming from the UN. A statement by President Nimir a few months ago that the Government, which owns much of the available land, would be prepared to let it on long leases to foreign organisations and companies was highly significant, since it suggested that private enterprise, often considered a vital ingredient in savannah farming, would be allowed to play a part.

The livestock potential of the 80m. acres of rangeland in the rain-fed areas is generally considered excellent, though how it should be exploited is a matter of considerable disagreement among the various consultants who have studied or who are studying the problem on behalf of the Sudan Government. development agencies and private concerns. Broadly, two possibilities have been canvassed: first, cattle ranching, involving a vast fenced area, the sinking of wells and the growing of grass. More than one report has said this is possible, but others point to the very high cost of fencing the large area needed, the difficulty of imposing security and the problem of obtaining the necessary acreage from the nomads who presently graze it.

The other main possibility is to use the land for a range of crops, including sorghum, millet, and soya, which could be grown on a piece-rate basis, has been a success almost from the start, producing 80,000 tons this year. The experience acquired here should go some way to ensuring the success of two new factories

being constructed by a British company, Fletcher and Stewart, the first of which comes on stream next year. The Sennar project should be producing 110,000 tons of sugar a year by 1977-78; the bulk of the finance has been provided by the Kuwait Fund for Arab Development and Lloyds Bank, with British aid also involved.

The second factory is being built at Hagar-El-Asalaya and will have the same capacity, coming fully on stream by 1978-79. Part of the finance is being supplied by the Sudan Development Corporation, using part of the \$200m. Saudi-backed Eurodollar loan. The cost of building the Sennar factory, a turnkey project, is put at \$218m., and the whole project cost is put at \$535m. The Sugar Corporation also expects to have a Belgian-built factory operating at Malut in the south in two to three years' time, and a fourth factory, also in the south, is projected.

The date 1977-78, though approximate, is nevertheless significant. For it is by then that the road from Port Sudan to Khartoum should be complete, thus freeing pressure on the railways. The first major blow to the infrastructural constraints on Sudan's economy will have been struck and the country will at last be able to export its agricultural output with greater ease. It is only from this date that the Sudanese economy can be expected to take off, if it is to take off.

But these projects, which are being financed by the Government with the aid of outside donors, are at least matched in importance by the expansion planned in sugar production. The Sudanese have a national sweet tooth, a fact which has cost the country dearly in terms of foreign exchange recently. There were riots in Khartoum last December when the sugar price to the consumer (which is subsidised) was raised from 8 piastres to 15 piastres.

Local consumption of sugar is put at about 300,000 tons for 1974-75. Of this 135,000 tons should this year be supplied by the two existing sugar plants run by the Sudan Sugar Corporation at Guneid and Khasm El Gira. The Guneid factory started early in the 1960s but has only recently overcome its teething troubles, the result of combining highly advanced equipment and an untrained force of tenant farmers. Its 1974-75 production is put at 55,000 tons, against its capacity of 60,000 tons.

Many lessons seem to have been learnt at Guneid over the years and the Khasm El Gira plant, which uses labour paid on a piece-rate basis, has been a success almost from the start, producing 80,000 tons this year. The experience acquired here should go some way to ensuring the success of two new factories

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The second factory is being built at Hagar-El-Asalaya and will have the same capacity, coming fully on stream by 1978-79. Part of the finance is being supplied by the Sudan Development Corporation, using part of the \$200m. Saudi-backed Eurodollar loan. The cost of building the Sennar factory, a turnkey project, is put at \$218m., and the whole project cost is put at \$535m. The Sugar Corporation also expects to have a Belgian-built factory operating at Malut in the south in two to three years' time, and a fourth factory, also in the south, is projected.

The date 1977-78, though approximate, is nevertheless significant. For it is by then that the road from Port Sudan to Khartoum should be complete, thus freeing pressure on the railways. The first major blow to the infrastructural constraints on Sudan's economy will have been struck and the country will at last be able to export its agricultural output with greater ease. It is only from this date that the Sudanese economy can be expected to take off, if it is to take off.

But these projects, which are being financed by the Government with the aid of outside donors, are at least matched in importance by the expansion planned in sugar production. The Sudanese have a national sweet tooth, a fact which has cost the country dearly in terms of foreign exchange recently. There were riots in Khartoum last December when the sugar price to the consumer (which is subsidised) was raised from 8 piastres to 15 piastres.

Local consumption of sugar is put at about 300,000 tons for 1974-75. Of this 135,000 tons should this year be supplied by the two existing sugar plants run by the Sudan Sugar Corporation at Guneid and Khasm El Gira. The Guneid factory started early in the 1960s but has only recently overcome its teething troubles, the result of combining highly advanced equipment and an untrained force of tenant farmers. Its 1974-75 production is put at 55,000 tons, against its capacity of 60,000 tons.

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Cotton the major money earner

RAW COTTON is the economic life-blood of the Sudan. It usually provides more than 60 per cent of the country's foreign exchange earnings, and its production remains the principal activity of the Gezira, still the largest unified farming enterprise in the world, and of the many lesser schemes whose development was encouraged by its success. It may be argued that British sponsorship of this remarkable enterprise was prompted by a self-interested desire to acquire cheap raw materials for a voracious domestic industry. Yet its administrative philosophy from the outset accorded priority to the Sudanese interest, and on achieving its independence in 1951, the country was left a legacy beyond price — an efficient organisation producing a commodity in much demand, with responsibility appearing fairly divided between the Government, the administering Gezira Board, and the individual tenant farmer.

In seeking to explain the Sudan's failure, over the course of more than 20 years, ever to profit fully from this promising start, one must give due weight to the success of synthetic fibres. In 1951 "polyester" was but a new British invention, still much enmeshed in argument about patent rights. To-day it has emerged as the most powerful enemy of cotton in many fields, and most spectacularly in that of the fine quality fibre, which is the Sudanese speciality.

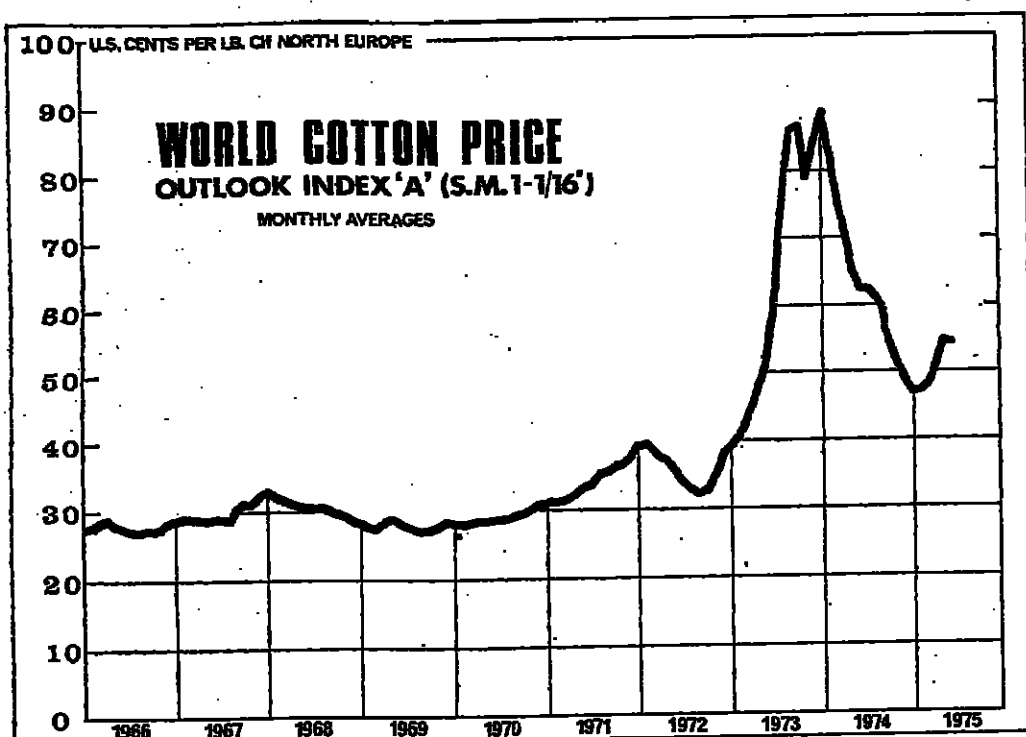
Only Egypt (effectively its originator) and Peru compete seriously with the Sudan in the export of such cotton and, like the Sudan, each has suffered from the synthetic onslaught. The more common "American-type" cottons have not been immune, but the intrinsically much superior "Egyptian-types" have rarely commanded their due premium in price.

Weaknesses

Throughout the 1960s, at least, the weaknesses of Sudanese cotton policy were therefore not readily apparent to those who were not intimately involved in the international marketing process. Egypt habitually sold its crop at relatively good prices, but the cottons were physically a trifle better, and any accumulated surplus could be disposed of surreptitiously against the country's huge military and economic debts to the Eastern bloc.

By 1971-72, however, successive crop failures around the world gave warning of what might result from a fundamental change of policy in Washington: The U.S. was no longer prepared to carry the financial burden, in times of surplus, of a domestic stock adequate to provide the world's needs in times of scarcity. Prices advanced rapidly, and fell back no less rapidly as producers seized the opportunity to increase acreage. Here was a pattern which other countries were quick to discern — if world boom and currency mis-trust were to coincide with crop failure, and a world slump with the subsequent increase in acreage, the movement of prices would be greatly magnified.

It would be ridiculous, of course, to imply that most (or indeed any) cotton marketing organisations foresaw, even as supplies began to tighten in the late autumn of 1972, the full extent of the impending rise, but what was abundantly clear at each new upward movement,



was that the strength of the market was by no means spent. Throughout this period, the Sudan was overwhelmed with bids for the accumulated stock. Yet far from exploiting the situation, Sudan sold a large proportion of its cotton at well below the realistic price, presumably still influenced by the clearly outdated theory that by doing so it would be helping to conserve markets further threatened by man-made fibres. At this juncture, the synthetic fibre industry was unable to satisfy the available demand. This fact ultimately dawned upon Khartoum, which withdrew all remaining supplies. By the autumn of 1973, the possibility of acreage increases the following year had begun at last to erode prices. There followed the Middle East war, a virtual rationing of petro-chemical feed-stock to the man-made fibre industries, and the explosion in oil prices. Cotton values briefly recovered. Yet once petro-chemical supplies were restored, it was apparent that the effect of high oil prices upon the Western economies, and in consequence upon the textile boom, would be the major influence for the foreseeable future.

The Sudan was thought to have carried about 75,000 bales (each weighing about 420 lbs) of Egyptian-type cotton into the 1974 calendar year, and was expected to begin harvesting in March the usual crop of about 1m. bales. It was alarming to learn at this stage that the "carryover" was, in fact, nearer 125,000, and that Khartoum saw no urgency in disposing of this cotton or in beginning forward sales of the new crop. This was an expensive attitude. Forward marketing did not begin, in fact, until April. The mistakes made on the rising market were even then repeated in depressing the fashion on the new crop were, of course, lower, but were nonetheless at handsomely above his torically satisfactory levels and would have given substantial profit. At successively lower tenders they were rejected in the hope of a subsequent price recovery. And to the total disbelief of the market, the Sudan carried a large proportion of the crop into the winter (and the price slump) of 1974/75.

Those who were directly responsible for the pursuit of these barren policies have now departed from office. Those who so often almost immune to past slumps, has been seriously undermined. While it would be misleading to imply that the industries not so sustained do not achieve the standard of quality attained in, say, Europe, their use of fine, Egyptian-type yarn is undeniably less, and their use of man-made fibre or the "cheaper" cottons for the production of sewing thread discernibly more. Thus, the developing countries tend both to reduce the consumption of Egyptian-type cotton in the production of cloth, and to lower the proportion of such cotton used to make the thread with which cloth is sewn together. In many of the countries involved in this export trade, cotton textiles are as critical to the economy as is raw cotton to the Sudan. During the current world recession, their governments have in consequence given high priority to assisting the industry to maintain exports, by such means as the provision of generous credit. The present slump in textiles sales has therefore impinged with particular severity upon the domestic industries of the importing countries, with the added disadvantage that the domestic sewing thread trade, so often almost immune to past slumps, has been seriously undermined.

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Egypt at least has a partial "hedge" against this situation, in that it has been steadily increasing its textile exports, and is doubtless a direct influence in the discomfiture of the European yarn trade. The Sudan, in contrast, is not even self-sufficient in cotton textiles, and can therefore find no quick salvation from its own mills.

Exports

The Sudan suffers, too, from complex internal defects which have been brought glaringly into the open by the recent marketing failures. It will be recalled that the British left a raw cotton producing system based, in effect upon "partnership" between the Government, the producing Board, and the tenant. When overall supervisory authority devolved unquestionably upon the British administrators, this system appeared admirable. It ill behoves an Englishman to point a scornful finger to-day at any system which has allowed effective control of policy to pass out of the hands of those responsible for its administration. It remains true, nonetheless, that the Sudanese tenant farmer is now a most potent political force. The Government has had some success in persuading him to grow American-type rather than the Egyptian-type cotton in recent years. But by any criterion of sensible marketing, it would now be adjudged reasonable for the Sudan to recognise the very limited sales potential for its long staple cottons over the next few months, and to reduce production still further in the interest of obtaining better prices for the current stock and for such cotton as is grown. The planting season has already started, and the tenant who will not recognise the extent of the current predicament cannot reasonably call others to task for any marketing failure.

While the foregoing remarks concentrate, as they must, upon the gloomier aspects of the present situation, one can find much reassurance in recent developments. The Government is now well aware that much of the past failure has arisen from inadequate co-operation between producers, administrators and the marketing authority, which has led to their almost total ignorance of their respective difficulties. Steps are being taken to ensure that proper communication is restored. Efforts are also being made to achieve closer contact with the importing countries. This is a more difficult problem than it would appear: nationalisation of the process by which cotton is offered abroad is too recent an event to permit the assumption of absolute trust in market information. An importer, after all, cannot but be motivated by self interest. What machinery will segregate the subjective from the objective in the matter of information and advice? It is my belief that disinterested information is made available more often than the commodity exporting country appreciates, since the buyer may find it useful that his advice is sought, and will seek to ensure that it is needed again.

The current visitor to Khartoum will take comfort in discovering that all aspects of cotton in the Sudan are being subjected to critical self-examination. The Sudanese output of both American-type and Egyptian-type cottons is intrinsically excellent, and the local cost of production is probably not high. As certainly as the world market has declined, it will ultimately recover. When it does, Khartoum will surely be prepared to seize the opportunity.

It is reasonable to suppose that the massive expansion of the Sudan's agriculture, which is often talked about would take place much on the lines suggested above, but apart from the financial and infrastructural constraints, development is likely to be held in check by the need to assess accurately whether or not specific kinds of development are economically or commercially viable. Development will probably be a cautious process of gaining and making use of experience in new fields.

Expansion

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Feed

CONTINUED FROM PREVIOUS PAGE

consists of improving the present meat marketing structure. At present nomads raise cattle as they trek across the country, uncannily anticipating precipitation rates. They are thought to sell only about 2 per cent. of their stock a year, which is sent to Khartoum, usually on the hoof, slaughtered and either marketed locally or exported, often by air. A project has been prepared for South Darfur with FAO technical assistance and aid from several countries and development organisations by which the nomads would bring their cattle to centralised feedlots supplied with fodder from associated farmland. The cattle would reach their saleable weight in two years instead of the present six or seven, and a much higher depletion rate — sometimes put as high as 15 per cent. — could probably be allowed. The cattle would be sent to Khartoum for slaughter, and freezing on a much larger scale than at present.

A small version of this scheme could start operating within a year or 18 months and become fully productive in five years. But it will face immense problems. In the past it has been difficult to persuade the nomads to sell their cattle at reasonable prices and Government meat price control measures have not always helped. There is a vital need to eradicate disease, both from the area where the cattle would feed and gradually from Sudanese cattle altogether, in order to make their world-wide marketing a viable proposition. There are the inevitable infrastructural problems. But the Government has already decided that it will set up a meat marketing board to handle all meat sales, thus cutting the traditional meat merchants out of the export business.

Sudan is believed to have the largest number of animals in any African country apart from Ethiopia. The estimates put

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